

WHITEPAPER

AI at the Core: How AI-Native Platforms Are Accelerating the Telco-to-Techco Shift

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Introduction

The telecom sector is going through a deep transformation. Vendor exits and consolidation across networks, hardware, and software are clear signals of an ecosystem under pressure.

With revenues constrained and cost efficiency now the primary growth lever, markets are shrinking, consolidation is accelerating, and experimentation is giving way to accountability. Open RAN ambitions are being recalibrated, hardware choices are narrowing, and core software domains like BSS and OSS are consolidating fast.

Operators no longer want complex vendor stacks or fragmented platforms. They want fewer partners, clear ownership, AI-driven automation, and scalable, end-to-end platforms.

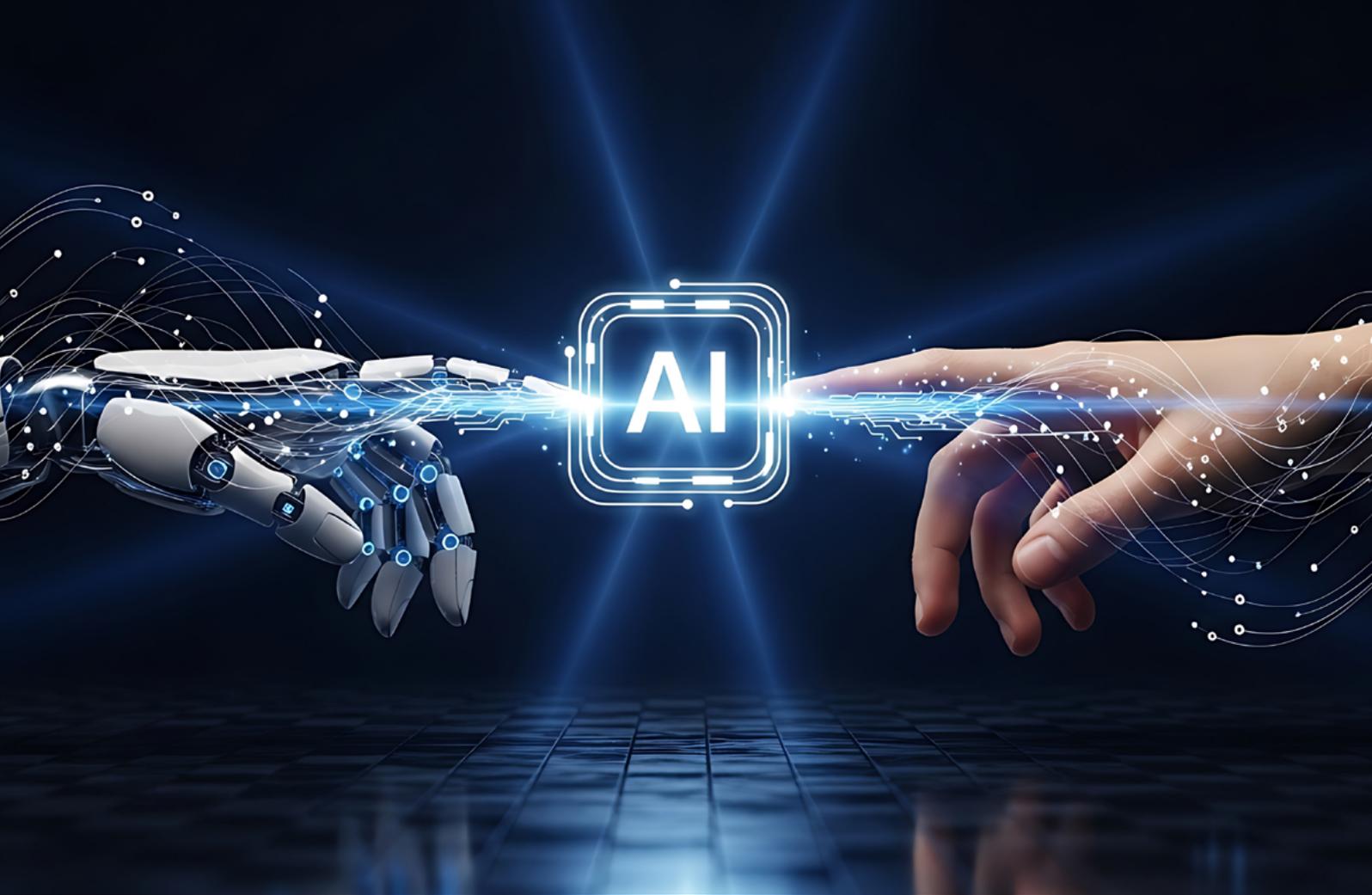
As GenAI lowers the cost of software creation and disrupts traditional pricing models, the winners will be telcos that simplify operations, integrate across the stack, and deliver real business outcomes not just technology.

Recent research from GSMA Intelligence tells us that telco executives acknowledge all this and agree that AI must move from the edge to the core of their operations for them to transform into fully AI-native telcos (or techcos). They also generally recognise that while there's no need to implement AI everywhere all at once, it's important to start now – and time is of the essence.

The big questions are where to start? What is a workable roadmap to becoming an AI-native techco? What challenges do telcos face? How can they establish the right structures and capabilities to recognise and respond to those challenges effectively, whilst also creating opportunities to drive innovation, build trust and deliver long-term value? And how quickly can they get there?

The good news is that AI-native blueprints for telcos already exist in some form or other. Industry institutions like the GSMA and TM Forum have been developing guidelines and frameworks to get members started. There's even a practical implementation model aligned with those frameworks via SaaS solutions provider Circles, which has developed the world's first AI Digital Mobile Operator (AI-DMO) model that provides an accelerated (and road-tested) pathway to AI transformation.

This paper looks at the trends observed by GSMA Intelligence and others driving the imperative for telcos to embrace native AI, the potential benefits therein, the challenges telcos face in pursuing that strategy, examples of blueprints that provide a roadmap to transformation, and possible strategies for implementing them, including examples of how an AI-first operating model such as Circles' AI-DMO can be adopted quickly, safely, and with measurable speed to impact.



Trends: Why Telcos Need AI

The telecoms sector has been under pressure for years as the digital age has progressed. Telcos found themselves blindsided by nimble over-the-top (OTT) cloud-native players that captured the higher value growth segments as traditional telco revenues have slowed. According to PwC, telco service revenue growth is projected to slow from 4.3% in 2023 to 2.5% in 2028. Research company Omdia is slightly more optimistic: in a report published in October 2025, it forecast 2.7% global annual revenue growth to 2030. However, that pales in comparison to hyperscalers like Amazon, Alphabet, Apple, Meta and Microsoft, which are collectively expected to see 9.4% CAGR revenue growth in the same period.

What's worse, according to GSMA Intelligence, the return on capital invested is trending lower than the weighted average cost of capital. The rush to upgrade to 5G has

contributed to increasing cost pressure on the capex side, while opex is also being driven upwards by labour and energy costs. Omdia echoes that trend, forecasting telecom capex to outpace revenue growth at 3.6% CAGR to 2030, driven largely by expected investments in 6G as well as the need to expand data centre capacity to support investments in AI infrastructure, cloud services, and digital sovereignty policies.

Meanwhile, customer expectations are also changing, and telcos are struggling to keep up. Telcos have long since realised that customer experience (CX) is a crucial market differentiator in the digital world. Unfortunately, the industry overall doesn't have a great reputation for customer satisfaction. A recent report from Simon-Kuchner found that the average global NPS for telcos is 14 – which is way below industries such as insurance (80),

financial services (75), retail (59), e-commerce (53) and healthcare (52).

Ironically, the rise of AI is partly responsible for this, as it has changed customer expectations in terms of a good experience. Customers increasingly expect products and services to be frictionless and automatically customised experiences that can adapt to their own personal preferences.

However, there is also evidence that AI will be essential in helping telcos to address these and other challenges. Several forecasts indicate that AI-driven automation and AI-enhanced CX will be critical to operator competitiveness. A study from NVIDIA in 2024 found that telcos that leverage AI effectively were able to improve employee productivity 58%, improve network operations 32%, and enhance CX by 37%.

How AI is changing the telco game

Telecom is no longer just about connectivity. It's about intelligence. The industry is undergoing a full-stack reinvention, not an incremental upgrade, but a strategic reset.

The future belongs to telcos that think like software companies, operate like cloud providers, and monetise like platforms.

AI also unlocks significant value on the CX front. Use cases such as recommendation engines and generative AI assistants are reshaping how operators respond to and interact with users, making services more anticipatory, responsive, personal, and effective, which in turn not only improves opex efficiencies, but also creates opportunities for revenue growth.

AI also promises to streamline the back office and internal processes to unprecedented levels of efficiency,

productivity and agility at every level of the organisation, from HR and finance to supply chain management and fraud detection.

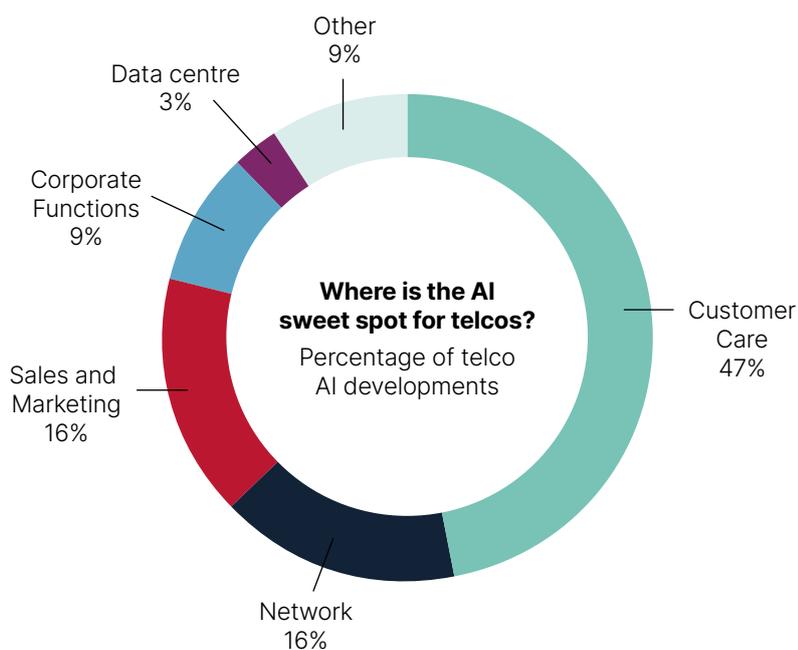
Perhaps most importantly, this transformation of the telco into an AI-native techco creates the opportunity to channel that AI-powered internal efficiency and customer loyalty into new revenue streams and value pools. Techcos can leverage their unique assets – infrastructure, APIs, trusted relationships and vast amounts of unique data – to unlock new business models and position themselves as central players in the broader AI ecosystem.

For the most part, telcos are already sold on the AI paradigm, at least in principle. Tellingly, according to recent GSMA Intelligence research, AI has become one of their top investment priorities in the past year. That said,

current trends also demonstrate that while telcos are clear on the potential benefits of AI, they're also being selective about where they deploy it.

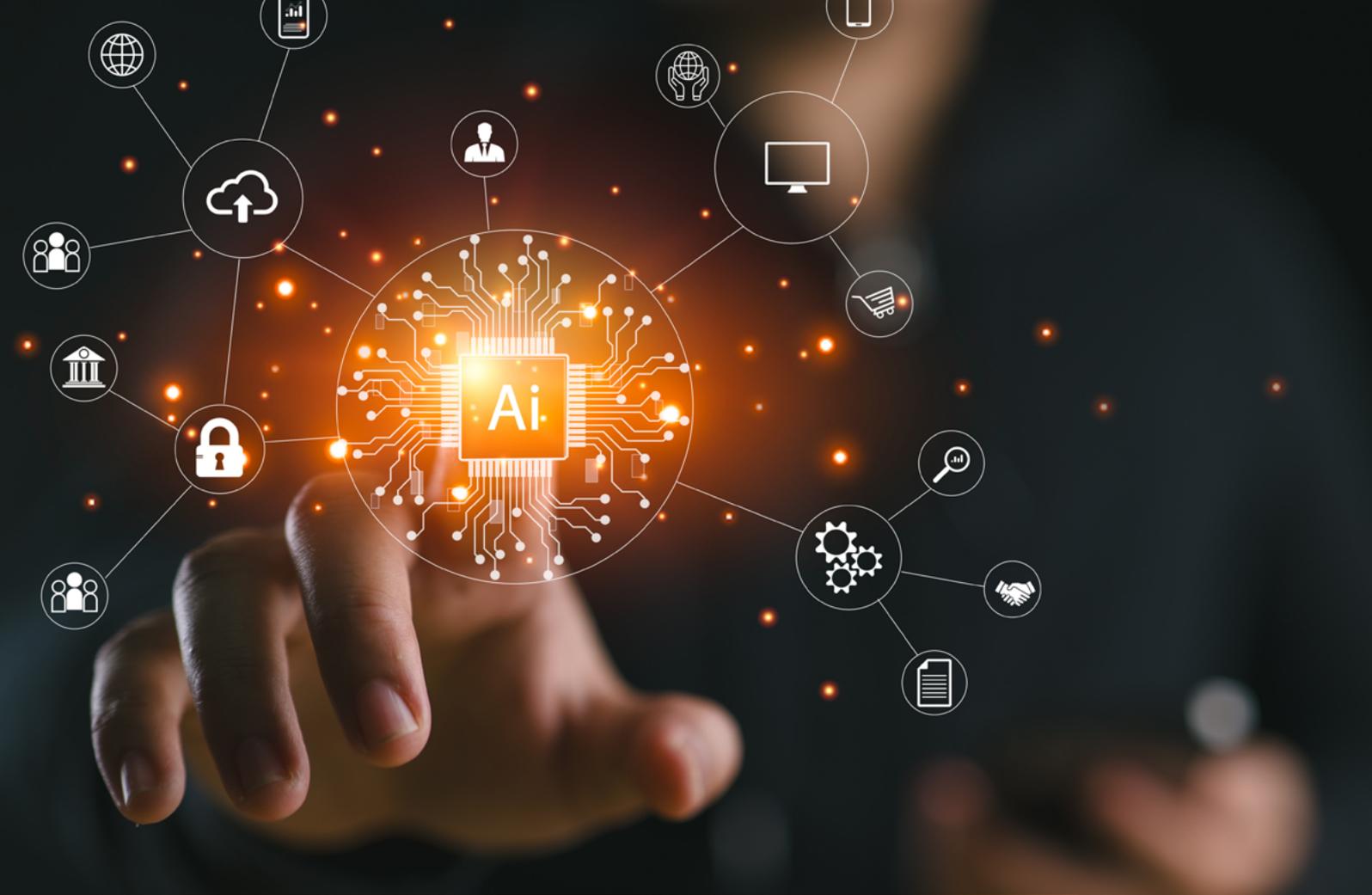
According to the Telco AI: State of the Market, Q4 2025 report from GSMA Intelligence, 66% of mobile operators surveyed globally had live AI deployments in their operations. While the lion's share of AI has been deployed in the customer care segment (47% globally), operators have also been deploying it in segments like network (16%), sales & marketing (16%), corporate functions (9%) and data centres (3%).

As the report notes: "It's a long race." While telcos see the pervasive applicability of AI across the board, the practical reality is that they're deploying it where it makes sense to do so, not all at once.



Source: GSMA Intelligence





Challenges To AI Adoption

Like most paradigm shifts, going AI-native is easier said than done. Telcos face several barriers to adopting AI, and in large part they're the same basic barriers to adoption of any game-changing technology in the telecoms space.

For a start, telco procurement cycles tend to be slow, traditionally lasting nine to 12 months at a time, which is one reason it's difficult for them to keep up with and invest in the latest technological innovations.

Telcos are also saddled with a lot of legacy infrastructure that can sometimes predate the internet age. It's a complex and messy mishmash of equipment that all has to be migrated to a new platform seamlessly. While it is certainly doable and in fact has been done by a growing number of telcos, it's a massive undertaking for a relatively risk-averse industry.

A third barrier is the human element. Any digital transformation project requires buy-in from every level of the organisation, which also requires tearing down the traditional business silos that managers may have become protective of, with the mentality often being "if it ain't broke, don't fix it." This also presents the problem of fragmented data systems, where data is stored in its own departmental silos, which works against the entire value proposition for AI.

That said, a key human-related barrier for AI specifically isn't resistance to change but lack of skillsets. GSMA Intelligence research had found that lack of internal expertise is the biggest obstacle to genAI deployment, highlighting the critical need for upskilling.

This is harder than it may sound, as using AI effectively requires being trained to use it properly – and not just the top-level managers, but everyone

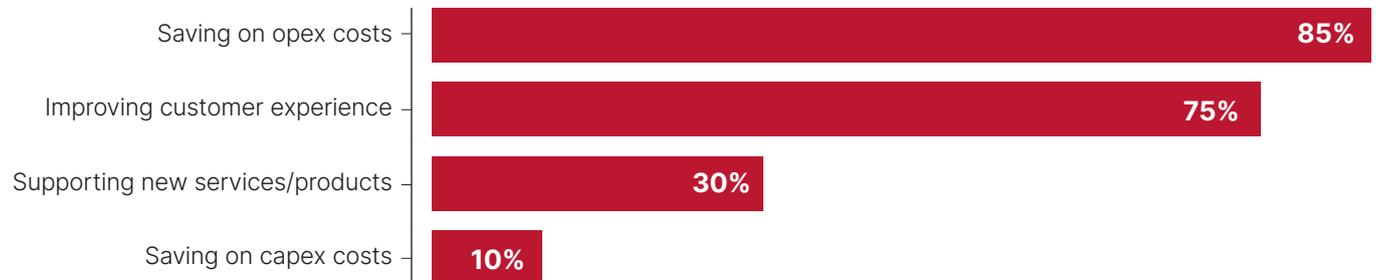
from the back office to the front line. This matters in part because hiring new people with AI skillsets is a challenge in itself, with demand outstripping supply. A recent Responsible AI Survey from EY found that the greatest demand for AI upskilling lies in roles like cybersecurity (67%), IT infrastructure (63%) and data science (60%), which are difficult roles to fill.

According to the same EY survey, 55% of telco CEOs said that AI adoption is hampered by the difficulty of developing effective governance frameworks, while 53% also cited regulatory complexity, and 40% cited challenges around which use cases to prioritise.

AI continues to be seen as a tool for customer care and opex efficiencies rather than revenue-generating services

Business objectives guiding artificial intelligence

What business objectives are guiding artificial intelligence (including generative AI) investments related to your network infrastructure?



Source: GSMA Intelligence Operators in Focus: Network Transformation Survey 2025

Optimisation before revenues?

As mentioned earlier, such obstacles aren't hindering telco investments in AI, but they may play a partial role in influencing where those investments are directed.

For example, on the network operations side, the GSMA Intelligence Network Transformation Survey 2025 found that 85% of survey respondents named opex savings as their top objective for AI investment last year, rather than capitalising on new revenue generation opportunities.

GSMA Intelligence reckons this suggests that of all the potential benefits of going AI-native, network operations chiefs see more immediate benefits in its efficiency and automation capabilities (which addresses real pain points), while still unsure of how exactly they can leverage their networks to monetise AI.

However, while GSMA Intelligence's Telco AI report also found that telcos overall were investing more in AI to boost opex efficiencies, telcos are already shifting their AI investments to focus more on revenue generation. AI monetisation models are emerging among a handful of early movers such as Verizon, Deutsche Telekom, e&, SK Telecom, Vodafone and Orange. In the second half of 2025, 27% of new AI

deployments in Europe involved embedding AI in new products or existing ones to drive upsell. In the US, that figure is 50%.

Telcos in reactive mode

However, regardless of where telcos are prioritising their AI investments, the results of AI-related deployments have been mixed. Research from NVIDIA indicates that for telcos that have adopted AI in some form, 79% of them are seeing revenue increases of less than 10%, while 89% are seeing cost reductions of less than 4% – neither of which comes close to unlocking the true value of AI.

A key issue preventing that value from being realised is that many telcos are deploying AI in reactive mode, bolting a new technology onto reactive workflows. This typically results in AI sitting on top of legacy BSS/OSS stacks, where data is still fragmented across various legacy silos (BSS/OSS, network, channels, etc). This means AI agents are themselves effectively siloed, resulting in insights that are not real-time and lack crucial context. Put another way, insights gained from such systems are reactive, not anticipatory.

In this deployment scenario, AI becomes a management cost centre with long experimentation cycles and an unclear ROI, which also hampers its ability to scale quickly. Meanwhile, apart from being a management headache, it also exposes the operator brand to increased risk if their AI solutions lack sufficient data protection guardrails, governance, and explainability.

These problems can be avoided with an AI-native model designed specifically for telcos. Deploying full-stack software with AI at the core (rather than being bolted on) creates a single source of truth and supports telco-specific continuous-learning models. It also scales better and faster, as new use case pilots can reuse the same basic AI foundation. Furthermore, it enables customer-centric AI that is able to anticipate customer needs and create new value.



Blueprints For AI-Techco Transformation

Deployment of any native AI solution will of course have to take into account the specific needs of each individual operator. Subsequently (and perhaps unhelpfully), there is no single definition for an AI-native telco.

For telcos that need a clear blueprint of how to become AI-native, several industry organisations have been working on this. For example, TM Forum is embedding AI into its open digital architecture (ODA) and autonomous network (AN) frameworks. Meanwhile, the GSMA is currently developing frameworks for AI integration with a focus on five specific fronts: responsible AI; strategy and leadership; data and infrastructure; skillsets development in the workforce; and development of AI products and services.

For telcos needing real-world examples of telcos making the shift to AI-native techcos that aligns with industry-led frameworks, they can check out what SaaS solutions provider Circles has been doing to help telcos make the transition to fully-fledged techcos.

The AI Digital Mobile Operator (AI-DMO)

Circles recently unveiled its AI-Digital Mobile Operator (AI-DMO) solution, which is designed as a blueprint for what an AI-native operator looks like.

In short, AI-DMO is powered by a full stack core-to-edge telco platform powered by embedded AI that works autonomously from a single source of truth and doesn't need custom integrations. That means it can be deployed quickly, and the benefits of going AI-native can be achieved much sooner.

The foundation at the enterprise-ready AI layer is a cloud-native core engineered for flexibility, security, and resilience at hyperscale levels. On top of that is an AI-first model layer comprising the intelligence core (the stack's "brain") that unifies data and applies intelligence for smart business outcomes, and an integrated SaaS platform that delivers a tailored AI-native experience that understands context, engages and anticipates customers' needs.

Finally, at the top of the stack is the AI-native CX application layer that delivers anticipatory experiences for consumers along the customer journey, from acquisition and retention to monetisation.

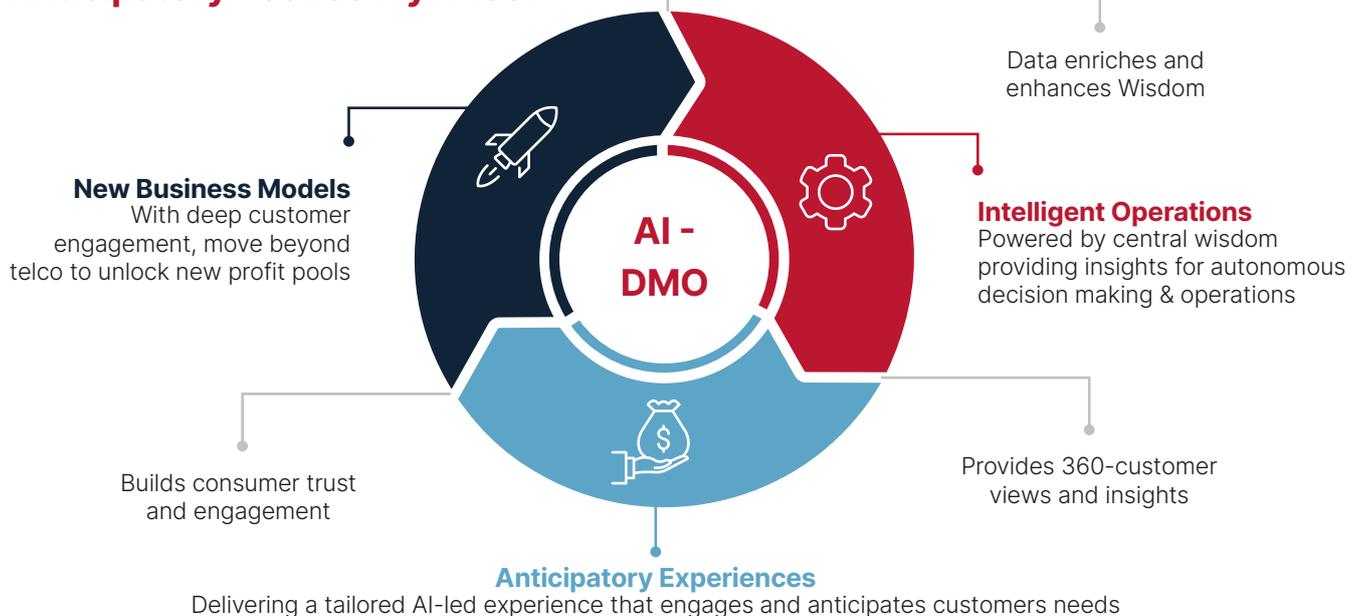
For all intents and purposes, this is what an AI-native telco looks like. Getting from the traditional telco model to here goes something like this:

The Circles techco concept essentially involves a transition from "optimised" to "predictive and autonomous"; from "personalised" to "contextual and anticipatory experiences"; and from "value-added services" to "new business model". Under Circles' "Ideal Techco Model", this means a techco can leverage better digital tools and processes, react faster to customer needs, tailor offerings to customer preferences, and unlock new business models, while running efficiently in autonomous mode.

The AI-DMO model goes even further by making all these characteristics anticipatory. The AI-native techco isn't just intelligent – it anticipates and adapts. It doesn't just respond faster to customer needs, it proactively predicts those needs, solves problems before they can occur, and knows what customers want before even the customer knows. What we currently call a platform will become the intelligence layer that serves customers.

Benefits of AI-DMO model

Anticipatory Techco Flywheel



The chief benefit of the AI-DMO model is best represented as a sort of “anticipatory techco flywheel”, which illustrates how successfully adopting AI can put telcos into a virtuous cycle that benefits revenue, cost savings, and new monetisation.

The starting point – as with all things AI – is clean data that enriches and enhances the wisdom of AI wherever it’s embedded. From there, the logical starting point is intelligent operations – using AI to provide insights for autonomous decision making and operations. As we’ve seen, this is already the starting point for many telcos who at the very least see AI as an efficiency play. But again, it’s not just about efficiency, but also anticipating operational decisions.

The data and wisdom generated from intelligent operations can also be used to provide 360° customer views and insights, which the AI-DMO can then channel into creating anticipatory

experiences, where the techco engages and anticipates customer needs to deliver a tailored AI-led experience.

Finally, as customer engagement and trust deepen, techcos can go even further along the monetisation path by unlocking new business models that can leverage those deeper, anticipatory customer relationships. Meanwhile, all of this is generating new valuable data that can be leveraged by the intelligent operations layer, and so on.

The AI-DMO model is also fortified by Circles’ SaaS delivery model and with a strategic and tech collaboration with OpenAI to co-develop the AI stack ecosystem partnerships, which includes access to leading large language models (LLMs) such as Gemini, OpenAI and Perplexity, which reduces time to value. Indeed, the AI-DMO model is designed to allow techcos to leverage AI faster and

accelerate speed to impact by enabling them to quickly create AI-driven digital brands, AI-driven telco transformation and new monetisation models.

All of this provides telcos with a fast track to AI-native status and the ability to not only execute AI-based strategies more quickly, but also realise the benefits sooner.

On a side note, another benefit of the AI-DMO model is that it can also be leveraged to streamline AI upskilling of the workforce. Data from the operator’s own learning experience with AI can be codified in the Circles X platform. This enables telcos to create a self-learning cycle shaped by learnings from the real world, which in turn can also make it easier for staff to use and gain intelligence – a process that typically takes a long time.

How AI-DMO fuels innovation and business growth

As we've said, the AI-DMO model serves as a blueprint for making the transition from telco to AI-native techco. Once you've started down that road, the next move is to find ways to make the most of those AI-native capabilities. Circles has developed several platform solutions that provide operators with ways to do just that, from driving engagement and creating anticipatory customer experiences to leveraging data-driven insights to keep up with (and even stay ahead of) shifting and accelerating market demands.

For example, Xplore AI is an aggregator with frontier models from multiple leading AI providers - something that telcos have found difficult to implement mainly due to integration complexity and procurement delays. With functionalities rivalling conversational AI chat platforms such as image generation, voice input/output and desktop mode, Xplore AI also innovates on value, as it drives more frequent engagement for users who typically visit the telco app once a month.

Xplore AI is powered by the Circles OS model for frictionless orchestration across data and systems. It enables plug-and-play access to vetted AI-native start-ups and global models, and eliminates procurement, integration, and compliance bottlenecks. That means non-telco partners can onboard quickly, embed Xplore AI into their apps easily, and go live with new services sooner.

Xplore AI has already been adopted by several operators around the world, including KDDI, which has deployed it for its "povo" digital sub-brand. By providing a sandbox environment to test, iterate and scale applications to drive non-telco engagement in its app, povo has seen a 30% rise in engagement and indirect ARPU.

In a survey conducted on new subscribers, 10% chose Circles for the AI functionality that came with their Circles subscription.

Circles has also developed Xplore IQ, an intelligence layer composed of an orchestra of AI agents with specialised functionalities. Apart from answering common user questions based on ingested FAQ documents, Xplore IQ also proactively recommends next best offers and next best actions to users across multiple app surfaces, including Xplore AI.

On the customer experience front, Circles has developed CareX, an AI-native conversational support OS designed to address one of the core challenges facing telecom operators today: delivering personalised, frictionless customer support at scale.

Rather than layering AI onto existing processes, CareX embeds directly into the telco support stack, unifying systems and automating end-to-end customer service workflows. It integrates seamlessly with existing CRM and BSS platforms, enabling operators to design, test, and deploy intelligent self-service journeys through a single conversational interface.

CareX guides customers step-by-step through issue resolution and diagnostics, using pre-trained, telco-specific AI agents to detect, diagnose, and resolve issues in real time. These agents deliver personalised recommendations based on customer queries, while content agents continuously learn from support manuals and knowledge bases to handle high-volume inquiries with fast, accurate responses.

Traditional AI-based call-centre solutions are typically limited to agent assistance or task automation, such as ticket classification and basic issue handling. While these approaches can reduce resolution times by 5-10% or automate 20-40% of low-complexity tasks, they remain reactive by design.

CareX takes a fundamentally different approach. By embedding AI across the full support workflow, CareX enables proactive issue detection, automated diagnostics, and guided resolution directly with the customer. Operators deploying CareX report baseline resolution time reductions of 60-90%, demonstrating the impact of AI when it is embedded natively and designed to anticipate customer needs rather than respond to them.



To make the most of AI-driven insights, telcos can deploy Circles' NOVA - an AI-native decision layer built for telecom operators who need to make decisions at market speed. It enables natural-language interactions to surface precise, validated insights, supported by guided diagnostics and anomaly-driven root-cause analysis across business domains.

At its core, NOVA is powered by a governed Knowledge Graph that defines and connects KPIs, metrics, and relationships transparently. This ensures every insight, explanation, and recommendation is traceable, consistent, and trusted, providing a single foundation for decision-making across teams.

NOVA continuously monitors performance through alerts, automatically detecting anomalies and early warning signals across critical metrics. When deviations occur, the right teams are notified with full context; including contributing drivers and recommended next steps, enabling faster resolutions.

As operators scale AI adoption across markets, NOVA Extensions provide the control required to do so safely. AI capabilities can be enabled by domain, access is governed, environments are managed, and integrations remain secure, allowing operators to move from early AI pilots to full enterprise deployment with confidence.

By shifting from dashboards to decision-ready intelligence, NOVA reduces the cost and time required to move from question to action. Operators benefit from faster decisions, proactive operations, and a scalable intelligence foundation that supports future AI workflows and long-term enterprise data strategy.



How to get started

The GSMA AI Forum has noted a relationship between maturity and opportunity. In other words, early-stage operators tend to focus more on internal AI for network and operational efficiency, while more mature players are moving ahead with customer-facing innovations and external monetisation.

Another caveat, the GSMA says, is ecosystem readiness – regulation, infrastructure, and talent availability all play decisive roles in what a telco's AI-native roadmap will look like. Put simply, what works in South Korea or Europe may not work in Africa or Latin America. Consequently, the GSMA strongly advises telcos to align their AI ambitions with their maturity level and the realities of their local markets, from regulation and infrastructure to talent availability and customer demand.

The Circles AI-DMO has also been designed with this in mind – meaning that telcos that adopt the AI-DMO model have several paths forward without committing to a full-scale transformation right away.

For example, rather than go with a full-scale migration, telcos can use the AI-ready full-stack software to experiment with digital telco sub-brands. They can test the sub-brand fast, experiment with clear KPIs (such as NPS, ARPU and cost-to-serve) and prove the value of the

service. Then they can take what they've learned and scale up the sub-brand until it's able to stand alone as its own brand. Japanese telco KDDI is already taking this route with its povo sub-brand based on Circles' full stack platform.

Alternately, telcos can go ahead and migrate their entire legacy stack onto the new platform. After a preparatory period of onstage simplification, backstage legacy cleaning and cohort phase preparation, telcos can release an app to migrate existing customers onto the new stack, with the app still able to access data from the legacy stack during the transition to enable a smooth, controlled and seamless migration of customers to the new AI-native stack. Indonesia's Telkomsel has done just this, migrating all 20 million customers to Circles' stack.

It all starts with clean data

While approaches vary, most telcos that have started down the AI road agree that it is crucial to build a unified foundational layer of data that cuts across all telco domains. The real value of data is not the volume of it, but its uniqueness and how well organised, unified and governed it is. Shiv Putcha, Director of Research and Consulting, APAC, at GSMA Intelligence, notes that investments

in data lakes without an ability to access clean, cross-domain data "would render it into something more akin to a data swamp."

This involves more than just breaking down silos, Putcha says. "Operators have long dealt with a fragmented array of systems which have made data difficult to consume. To this end, data must be structured and cleaned into formats that are easily consumable."

This isn't just about making sure all of your data sets are useful and have value – it's also essential for training AI models. AI can't make inferences about scenarios it hasn't previously dealt with. It may be a cliché, but it's true: garbage in, garbage out. How well your AI models work – and how well they scale – absolutely depends on feeding them good data.

This can be a major challenge, since the vast majority of legacy data in just about any organisation is unstructured. Luckily for telcos, several cloud services providers offer a service called object storage, which is designed to help organisations sort out their data more easily, either on-prem or in the cloud, while still being able to access and manage it all in one place. Telcos have been increasingly leveraging object storage services to build their data lakes as part of a broader effort to modernise and simplify their software stacks.

Conclusion

AI is no longer just an emerging trend in telecoms – it's a fundamental driver of transformation that is reshaping how telcos optimise networks, enhance customer experiences and develop new revenue streams. The future of telecoms is a future of hyperscale automation, open ecosystems and AI-native operating models, where telcos are fast, intelligent and adaptive. In fact, they'll have to be to thrive in the digital era – unlike previous disruptive technologies, AI is actually accelerating the leapfrog effect for telcos. Telcos must make the transition to AI-native techcos or risk being left behind.

Most telcos are opting to start their AI journeys focusing on internal processes like network optimisation, opex efficiencies and customer care, rather than revenue generation. But that will only get them so far – there's a limit to how much cost savings can drive EBITDA, and some telcos have already started shifting their AI strategies to revenue generation.

While the journey, of course, will be different for everyone, there are several key transformation pillars telcos should incorporate into their roadmaps:

- Shift to a product- and platform-led mindset with clear ownership
- Make data and AI central to efficiency, customer experience, and new revenue
- Modernise IT with cloud-native, API-first architectures
- Adopt agile, automated, and resilient digital operations
- Build digital services beyond connectivity
- Invest in people and culture through reskilling and empowerment

There are plenty of hurdles to overcome – particularly fragmented data systems, legacy infrastructure and infusing the necessary skillsets into the workforce – but they *can* be overcome, provided telcos have a clear strategy, the right infrastructure, skilled talent, appropriate governance structures, and leadership alignment to drive AI-led growth.

Whichever path telcos choose, it pays to remember that this is a long game. The transformation from telco to AI-native techco will be a long and continuous one. That's why it's crucial for telcos to start now – a wait-and-see approach just means falling further behind the curve. Early movers will redefine the market, while laggards risk being reduced to infrastructure providers. Circles is keen to be part of that conversation and share its proven expertise in transitioning telcos into AI-native techcos aligned with the GSMA's future vision – and making that transition quickly and seamlessly to stay ahead of the game.



Founded in 2014, Circles is a global technology company reimagining the telco industry with its SaaS platform, helping telco operators launch and operate successful digital brands. Today, Circles is partnering with operators in 15 countries across 6 continents with the mission to deliver digital experiences to millions of people through our businesses. With Circles.Life, our digital lifestyle brand, we empower and delight customers across the world by offering digital experiences that go beyond traditional telco services. Circles is backed by global investors such as Peak XV Partners (formerly Sequoia), Warburg Pincus, EDBI and Founders Fund – renowned institutions with a track record of backing category creators.

Find out more at www.circles.co



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