SURVEY REPORT

Industry Survey 2026

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In partnership with

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Introduction

What can we expect from 6G? And when can we expect it? How should telcos handle the migration to cloud and edge? Will the compliance and security risks of agentic AI outweigh the advantages? Are NTN networks ready for adoption?

The questions in our industry never cease because the technology never stops moving. And this really matters. Why? Because each telecoms advance has material implications for the way billions of people talk, message, work and play.

So what are the big issues facing mobile professionals in 2026? What are they excited about? What are they worried about? For the last three years *Mobile World Live* has sought the answers by asking our readership. Around 200 respondents completed the survey, of which the three biggest areas of business were Software Development (21 percent), Mobile Network Operators (18 percent) and Network Infrastructure Providers (14 percent). 41 percent of respondents were either C-level, directors or VP-level, with 59 percent of all respondents based in Europe and 19 percent in Asia.

Here are this year's results.

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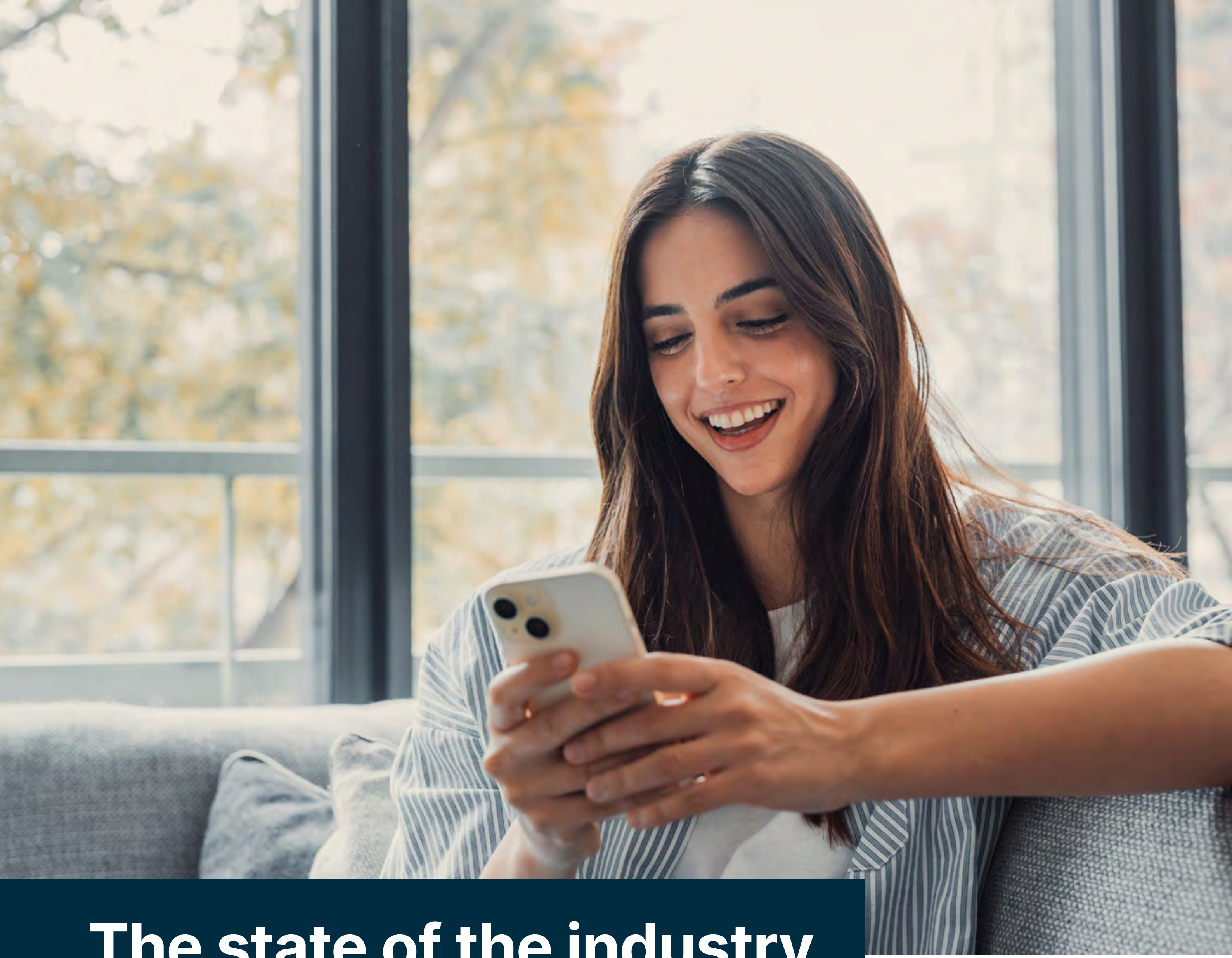


The state of the industry

The mobile industry is positioning itself to play a central role in the digitally transformed future. In 2025, GSMA Intelligence projected that advanced connectivity and mobile technologies could contribute $11 trillion to global GDP by 2030. That's a remarkable 8.4 percent of the total and a big leap on the 5.8 percent the telco space contributed in 2024.

So now is a critical time for the industry. Telco networks are currently putting into place the technologies that will help them build this hyper-connected future. Most obviously there is programmable standalone (SA) 5G, which will bring exponential improvements in speed, reach and capacity.

In 2025, the GSMA unveiled a concept called Complete 5G to showcase how an accelerated rollout of cloud-native, service-based 5G SA can drive economic growth. It described how 5G connectivity can become programmable through the provision of APIs, which support quality-on-demand, mobile identity services, location verification and other capabilities.

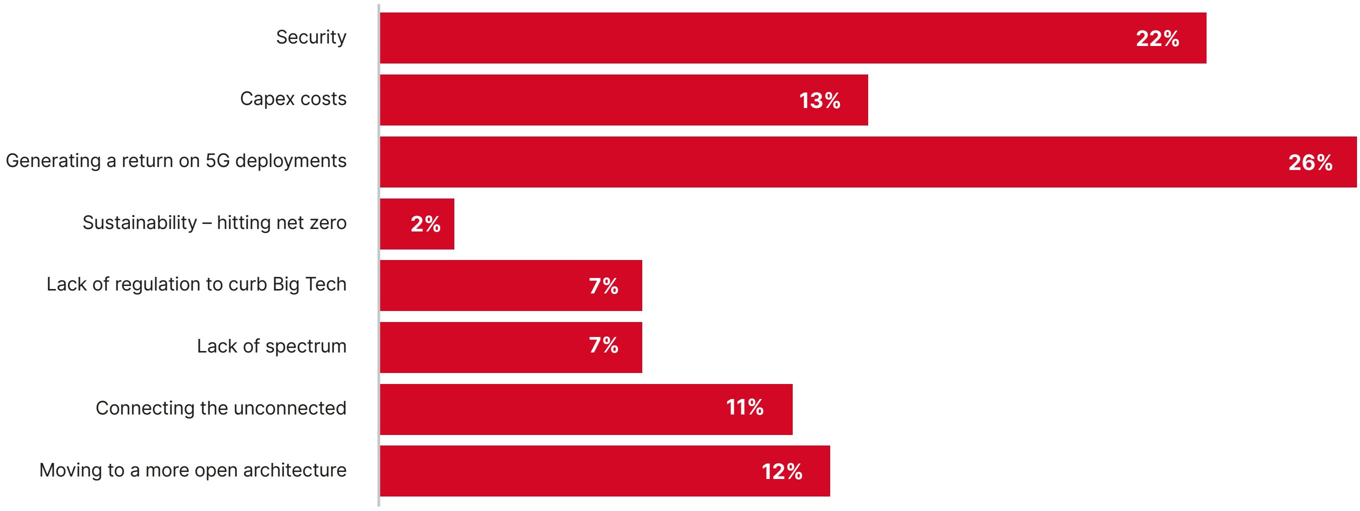
It also referenced how 5G-SA variations, such as 5G RedCap, can bring low-cost connectivity to devices such as wearables, sensors and Internet of Things end points. And finally, Complete 5G looked toward the integration of non-terrestrial networks (NTN), and their ability to close coverage gaps while building new use cases for industries such as shipping, logistics and mining.

This is the future we are all hoping to build. So how do industry personnel feel now? Are they confident the industry can overcome mounting security threats? Can it capitalise on the promise of machine learning and agentic AI? Is 5G SA progressing fast enough?

In this first part of our annual industry survey, we asked you to share your thoughts on the state of the industry. This is what you told us.

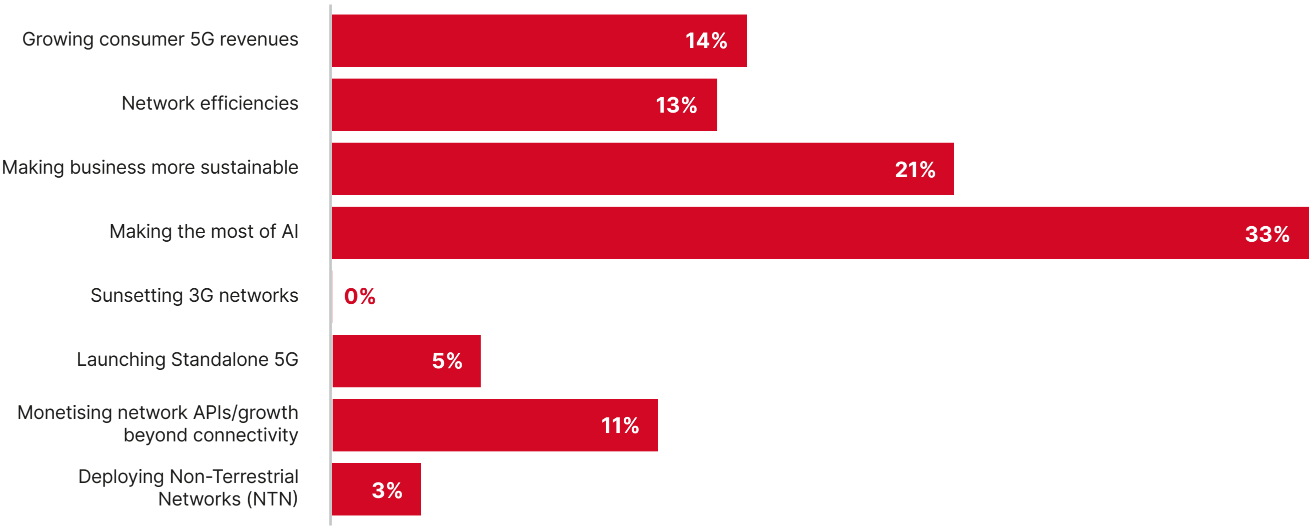
What's the biggest issue facing the mobile industry today?

Should we be surprised that revenue is the top concern for telcos in 2026? It probably is every year. The study found generating a return on 5G deployments was at number one with 26 percent of the votes. But it was followed closely by security at 22 percent. This is telling. In our 2025 survey, ROI was top with 32 percent while security gathered 17 percent. It seems the cybersecurity threat is looming larger than ever over the industry. Further down the list, 12 percent chose moving to a more open architecture, while capex costs accounted for 13 percent and connecting the unconnected was cited by 11 percent. The survey generally reveals how concrete business concerns trump more high minded issues. For example, lack of regulation to curb big tech, and sustainability/net zero garnered 7 and 2 percent of votes respectively.



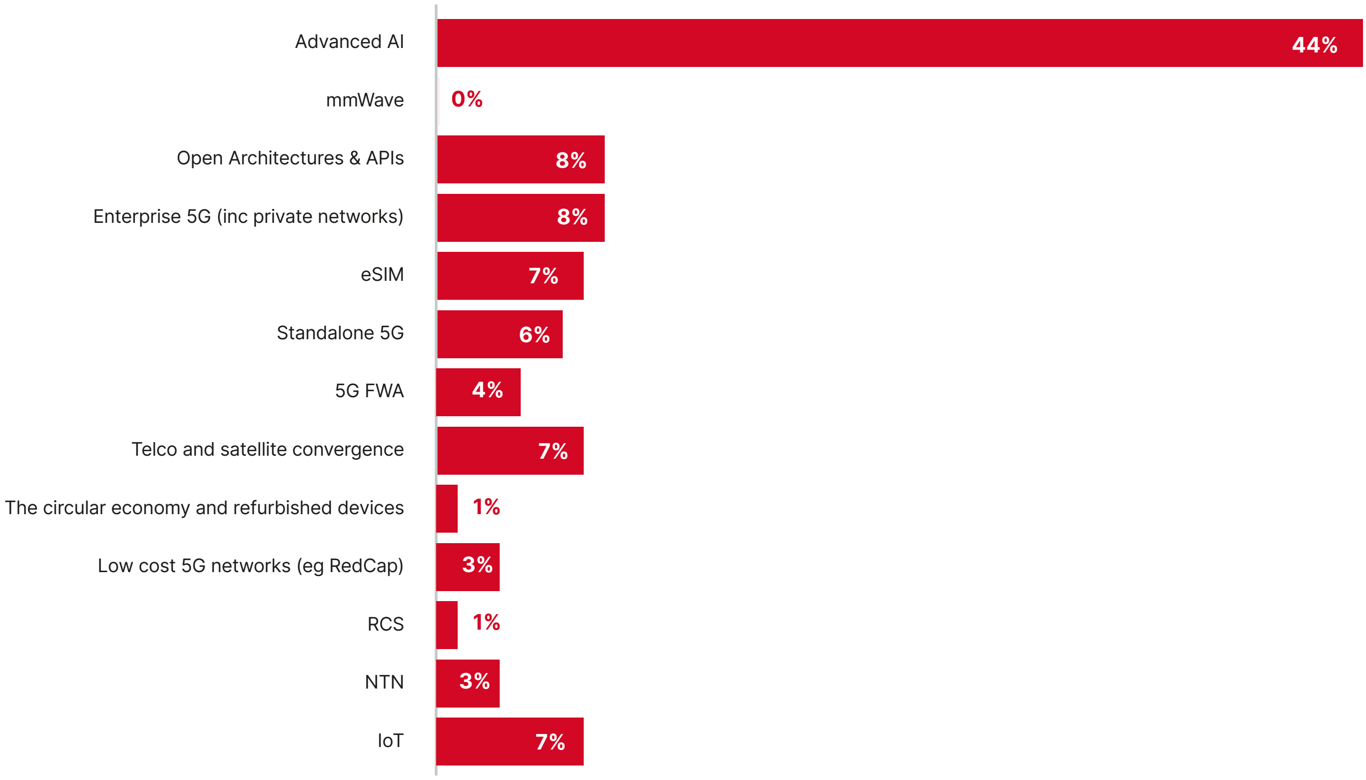
What is your number one priority in 2026?

AI has come out of the lab and into the mainstream. It's driving agendas everywhere. Mobile is no exception. Our survey revealed that making the most of AI is the overwhelming strategic priority for telcos in 2026. It was cited by 33 percent. This suggests organisations are moving beyond pilot projects toward production-scale deployments (see the AI/agentic chapter for more granular insight). Making business more sustainable followed at 21 percent, with growing consumer 5G revenues at 14 percent and network efficiencies at 13 percent. Interesting to see monetising network APIs score 11 percent, which suggests some momentum the GSMA's Open Gateway API initiative. Much further down the priority list are non-terrestrial networks and sunsetting 3G (3 per cent and zero respectively).



Which new business area will be the most attractive in 2026?

If question two revealed AI to be a priority for the telco sector, question three reveals why: new business. When asked which new business area will be most attractive in 2026, advanced AI dominated at 44 percent. It's one of the most emphatic findings in the whole study. It shows how AI is viewed not just as an operational tool, but as a business opportunity in its own right. Way down in second place was enterprise 5G (including private networks) and open architectures/APIs each with 8 percent. eSIM technology, telco and satellite convergence, and IoT each accounted for 7 percent. Standalone SA 5G represented 6 percent, while 5G fixed wireless access garnered 4 percent.



Where do you expect to increase monetisation for 5G?

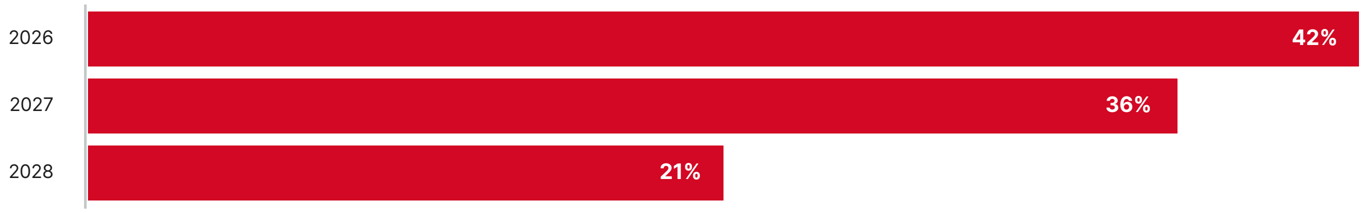
5G is slowly building momentum. It now represents more than 30 percent of connections in Europe against a global average of 24 percent. By 2030, it could provide an additional €164 billion boost to the global economy. But what about now? How do telcos expect to monetise the tech in 2026? Our survey revealed no dominant channel. Private networks topped the list at 40 percent, while IoT followed closely at 37 percent. Further back were consumer-focused products (AR/VR, cloud gaming, etc)/enhanced mobile experiences at 24 percent. Perhaps we can infer that, for now, it is easier to develop compelling enterprise 5G applications than to create entirely new consumer categories.

What will be the most overhyped market in 2026?

This year's study emphatically reflects the two sides of the AI story. The previous survey question gives evidence of the hope. This question reveals the hype. A whopping 73 percent of respondents cited AI as the most overhyped market of the year (agentic AI at 45 percent, generative AI at 28 percent). It indicates that 2026 might be too early for autonomous AI agents, and that security and hallucinations continue to undermine the promise of LLMs. The remaining topics of overhype are 5G-Advanced at 10 percent, fixed wireless access (8 percent) and eSIM (7 percent). We might assume that telcos are fairly convinced of the viability of these services.

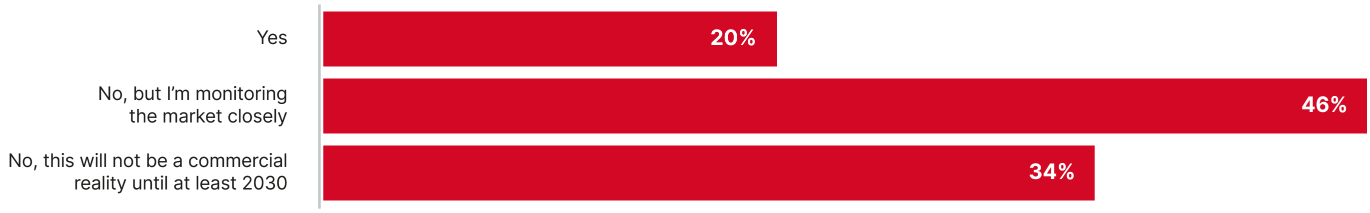
When do you plan to start making use of 5G-Advanced technology?

Momentum is building around SA 5G. It's estimated that 89 MNOs have launched and that there are now 2,518 SA 5G compatible devices available. Our survey reveals a general readiness to move beyond initial 5G deployments toward enhanced capabilities (massive machine-type communications [mMTC], ultra-reliable low-latency communications [URLLC], and enhanced mobile broadband [eMBB]). It found 42 percent of respondents expect to deploy this year, while 36 percent favour 2027 and 21 percent say they will. One in five say they will wait until 2028 to move ahead with SA 5G.



Have you already started to invest in 6G?

6G is a long way off (2030 at the earliest), but the industry is already laying its foundations. In mid-2025, for example, the 3GPP community met in Prague to launch the study phase for 6G under Release 20. Our survey reveals just one in five organisations are actively investing in 6G now. This is most likely engineering and academic research since 6G protocols are yet to be finalised. 46 percent indicated they are not yet investing in 6G but are monitoring the market closely. Meanwhile, close to a third believe 6G will not be a commercial reality until at least 2030 and are focusing elsewhere.



Satellite & NTNs

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The GSMA's State of Mobile Internet Connectivity Report revealed that more than 95 percent of the world's population is today covered by mobile broadband networks. It's impressive. But still a stubborn connectivity gap remains, one that telcos can't close with conventional network infrastructure.

For this reason attention is turning to satellite/non-terrestrial networks. In other words: locating mobile networks in space.

Non-terrestrial support for cellular is not new. Satellites have provided backhaul for existing networks over many years. But the bigger prize is direct to device (D2D), providing a direct connection between the satellite and the phone/IoT sensor.

A range of developments are driving D2D. One is the availability of low-Earth orbit (LEO) satellites, which are relatively cheap to build and support low latency data transmission. Chipset makers are playing their part too, developing NTN-ready processors for IoT and consumer devices. Meanwhile equipment manufacturers are finding solutions to the challenge of coordinating satellite movement and distance.

As a consequence, the satellite/cellular space is accelerating. In fact, the GSMA describes 2026 as launch time' for NTN. Juniper Research predicts D2D revenue could grow from $30 million in 2025 to almost $1.7 billion by 2029.

Today, most NTN services are based around emergency calling and messaging. But partnerships between satellite operators and MNOs are proliferating. Notably, T-Mobile US' T-Satellite service with Starlink went live in the US in 2025, offering messaging services to its customers and to AT&T and Verizon subscribers. By October 2025, it expanded to support apps such as WhatsApp, Google Maps and AccuWeather.

Overall, the GSMA catalogued 118 NTN services as of December 2025, of which 33 were live. It says these services have the potential to reach 6.1 billion people. But the benefits of NTN extend beyond the consumer market.

Use cases include:

Disaster support

Satellites provide resilient backup connectivity for emergency services when natural disasters damage terrestrial networks.

IoT at scale

NTN can extend the reach of IoT devices and sensors into previously inaccessible locations, for example energy, mining and environmental sensing.

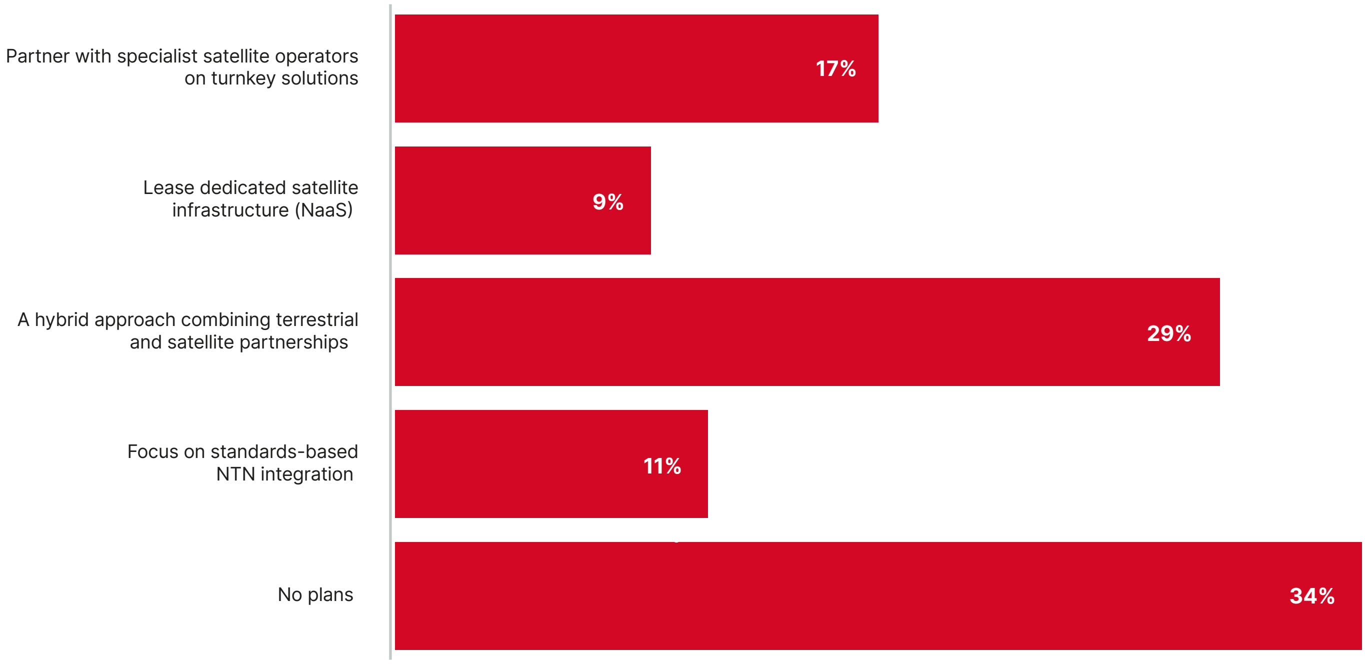
Devices in transit

NTN provides continuous connectivity for devices that are moving across oceans and continents. Use cases include tracking shipping containers, automotive vehicles, aircraft and more.

In 2025, we asked respondents to give their opinion of NTN for the first time. We asked about deployments, opportunities, barriers, timelines and more. The 2026 survey answers offer a fascinating insight into the progress made in the sector.

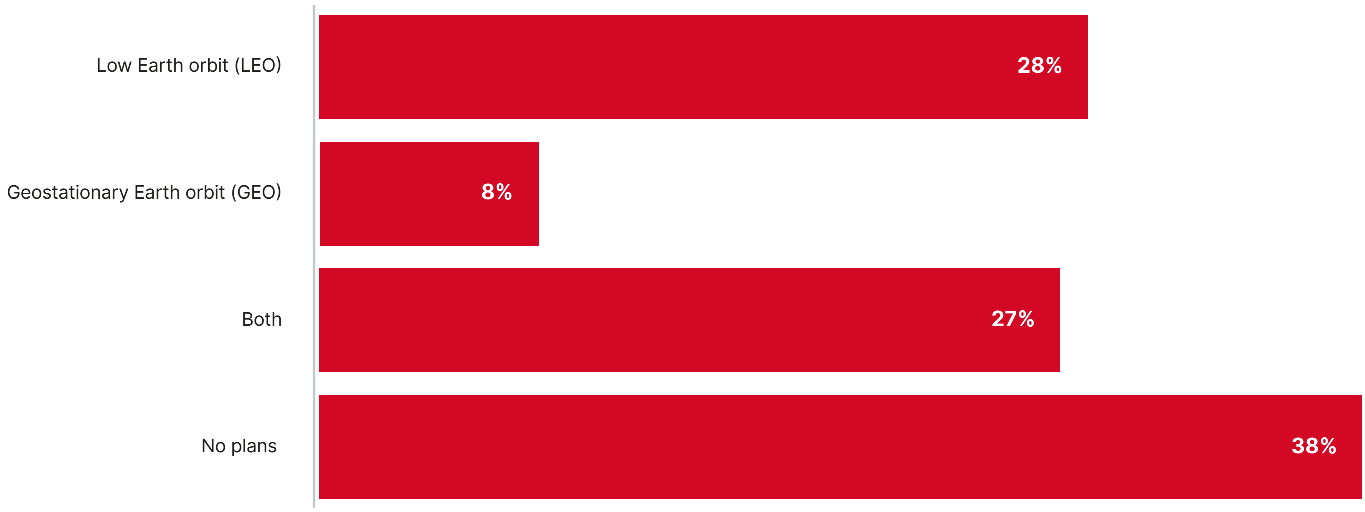
What is your strategy for deploying satellite connectivity?

Responses were fairly evenly split here. The largest segment (34 percent) have no plans for satellite connectivity, which would indicate that substantial portions of the industry are sceptical about the business case. Just under a third (29 percent) favour a hybrid approach combining terrestrial and satellite partnerships while 17 percent prefer to pursue partnerships with specialist satellite operators on turnkey solutions, rather than building proprietary systems. Just over one in ten plan to focus on standards-based NTN integration, while a slightly smaller number (9 percent) say they are leasing dedicated satellite infrastructure. This suggests there is modest appetite for the Network-as-a-Service model.



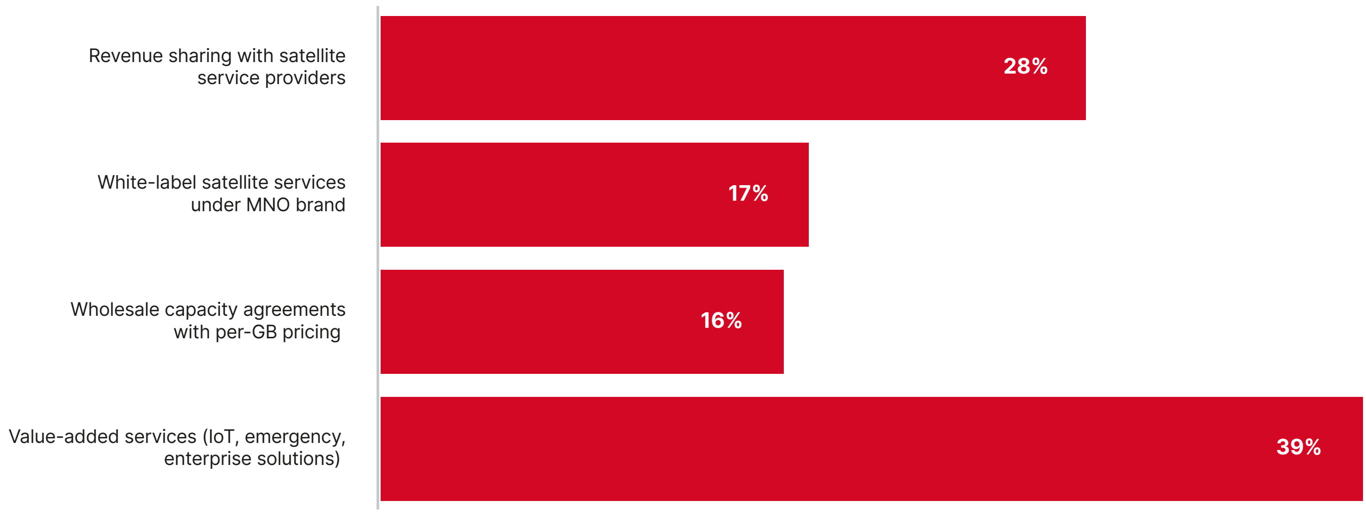
Which tech are you most likely to pursue in your NTN roadmap?

The received wisdom is that low Earth orbit satellites offer the best fit for NTN connectivity. Does the survey bear this out? Sort of. It found that 28 percent of respondents are most likely to pursue LEO for their roadmap. That's much more than GEO (8 percent) but almost the same as both LEO and GEO at 27 percent. However, the top answer was actually no plans which, consistent with question one, suggests a wait-and-see approach to NTN among many telcos.



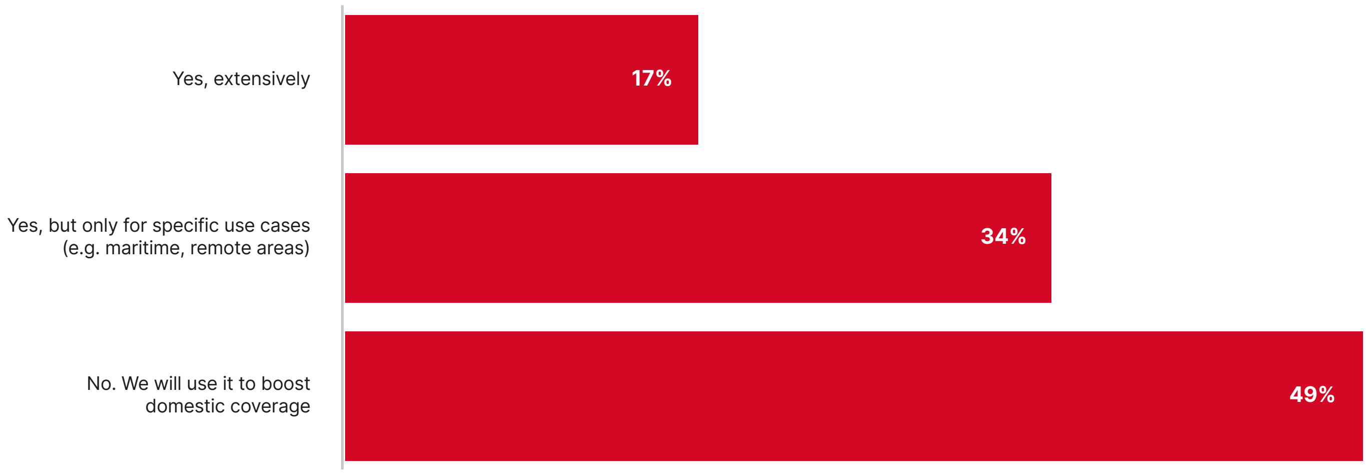
Which business model do you favour for satellite connectivity services?

The question of which NTN business model works best is a significant one. NTN has the potential to open intriguing industrial use cases, and demands the formation of new partnerships. Careful consideration is required. The survey reveals value-added services focused on IoT, emergency communications to be the most compelling model option, chosen by 39 percent. It shows how the value of NTN might be in specialised applications rather than general mobile services. Revenue sharing arrangements with satellite service providers was second at 28 percent, with white-label satellite services under MNO brands' at 17 percent. Wholesale capacity agreements with per-gigabyte pricing was the least popular choice.



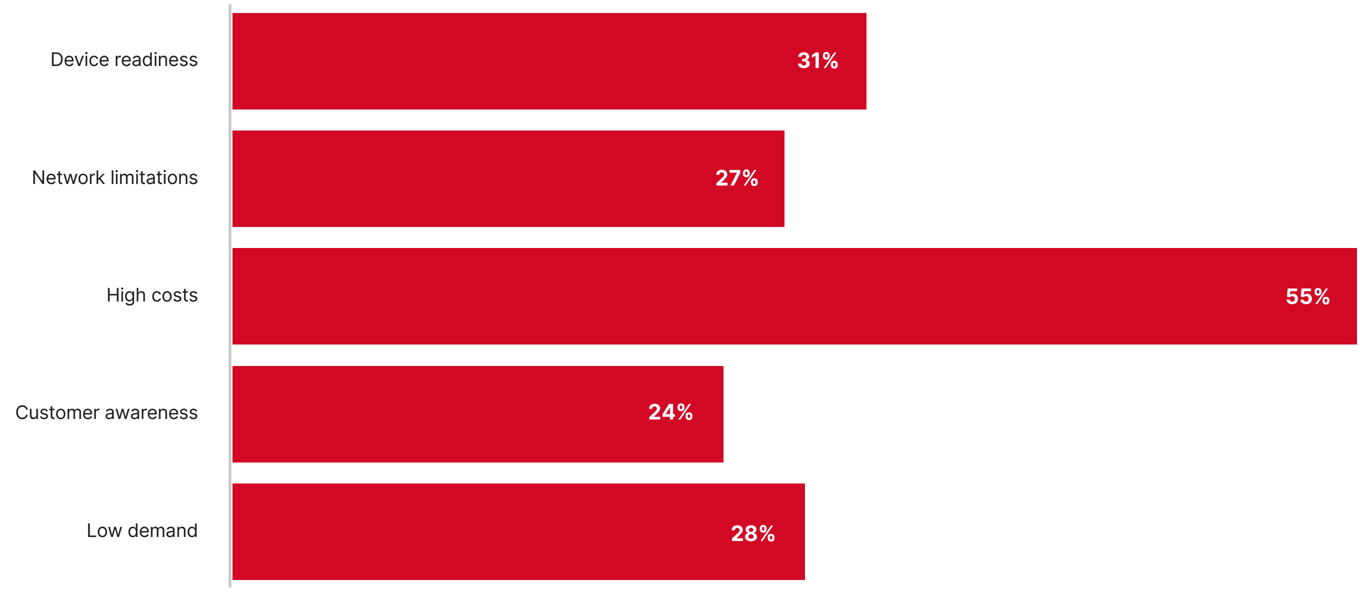
Will you deploy NTN to reach customers outside your own region?

NTN nullifies national borders. Locating networks in space clearly presents telcos with the ability to operate anywhere. Will they? Our survey suggests some are considering it. Let's be clear: just under half have no plans to deploy outside their existing geography. They see satellite connectivity primarily as a gap-filler for remote areas rather than as an international expansion tool. We might assume they are concerned by regulatory complexity around roaming. That said, 34 percent are considering NTN deployment for specific use cases in niches where terrestrial infrastructure is impractical or uneconomical. Meanwhile around one in six are considering extensive international deployment.



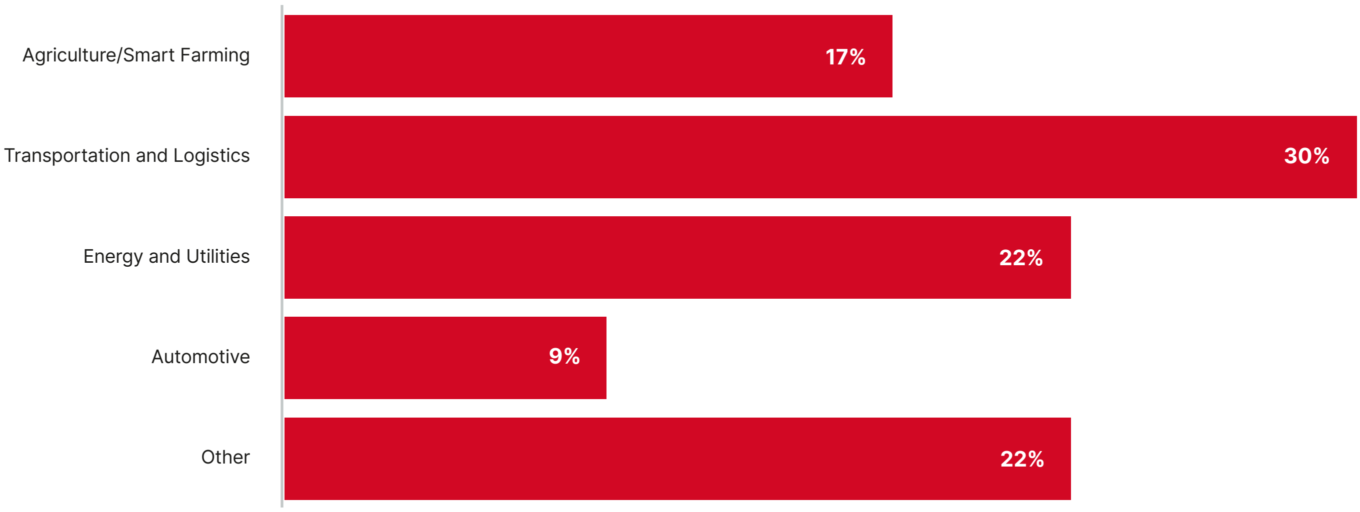
What are your biggest barriers to adopting NTN?

The GSMA might have described 2026 as launch time for NTN, but many telcos are still reticent. Why? Our survey suggests that for all the technological and logistical complexity associated with NTN, telcos have a more prosaic reservation: cost. This was cited as the primary barrier by 55 percent, reflecting concerns about infrastructure expenses, capacity pricing, device costs and overall economics compared to terrestrial alternatives. Device readiness was second at 31 percent. Perhaps, for all the progress in D2D, there's still a chicken-and-egg challenge. Low demand and network limitations accounted for 28 percent and 27 percent, respectively. Customer awareness was the least pressing concern at 24 percent. This suggests that telcos know they have a lot of challenges to overcome before worrying about the perceptions of end users.



Which vertical market will you target first for NTN IoT services?

Question three suggested a strong interest in using NTN to open value-added services in IoT. This question asks: which ones? The top choice, at 30 percent, is transportation and logistics, reflecting the potential for compelling use cases for tracking vehicles, ships, aircraft and cargo across areas lacking terrestrial coverage. Energy and utilities ranked second at 22 percent, while agriculture/smart farming was the choice of 17 percent. Interestingly, automotive accounted for just 9 percent. The connected vehicle market is a frequently-cited application of NTN, but maybe it is adequately-served by terrestrial networks.



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As this year's *Mobile World Live* survey highlights, satellite connectivity is rapidly moving from niche capability to mainstream consideration, particularly through the rise of D2D services. The growing focus on LEO architectures, with the report showing significantly more respondents prioritising LEO, highlights the industry's recognition that low-latency, space-based connectivity is becoming integral to the mobile ecosystem.

Globalstar has been at the forefront of this shift, pioneering large-scale D2D deployment and demonstrating how satellite can seamlessly complement terrestrial networks. At the same time, the survey's findings pinpoint an important element to NTN and satellite connectivity around regulatory complexity and cross-border considerations.

What is increasingly clear is that satellite is no longer confined to emergency use cases or large-scale broadband applications. From IoT expansion to broader mobility applications, the proliferation of satellite solutions can number in the tens of millions, creating applications of everyday use from consumer to enterprise. That transformation is exactly why this conversation matters and why we are proud to support this year's NTN chapter.

AI and agentic

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Telco engineers might groan at the sudden fixation on AI. They've been using machine learning tools for years to optimise network performance and improve predictive maintenance. Indeed, the GSMA brought together mobile operators and partners to create an AI for Impact initiative as long ago as 2017.

But there's no doubt that the rapid advance of generative pre-trained transformers like ChatGPT has propelled AI into the mainstream. Now, we are entering the age of the AI agent. Enterprises (and even some consumers) are starting to experiment with autonomous agentic bots that carry out tasks and make decisions.

Together these advances give AI the potential to impact every corner of the telco operation. In fact, MNOs are already deploying machine learning and autonomous AI agents to:

- Plan, optimise and manage the network
- Defend against fraud and cyber attacks
- Automate and improve customer care
- Automate sales and marketing tasks
- Manage billing, subscriptions and pricing processes

So far, customer care dominates telco AI deployments. According to a GSMA study conducted in 2025, it represents about 47 to 50 percent of tracked projects. This study further backs this up, with 29 percent of respondents citing customer care as the most compelling business case for AI virtual assistants.

Of course, scaling AI effectively remains challenging for telcos. Common hurdles include fragmented data systems, legacy infrastructure, compliance challenges, workforce talent and staff readiness.

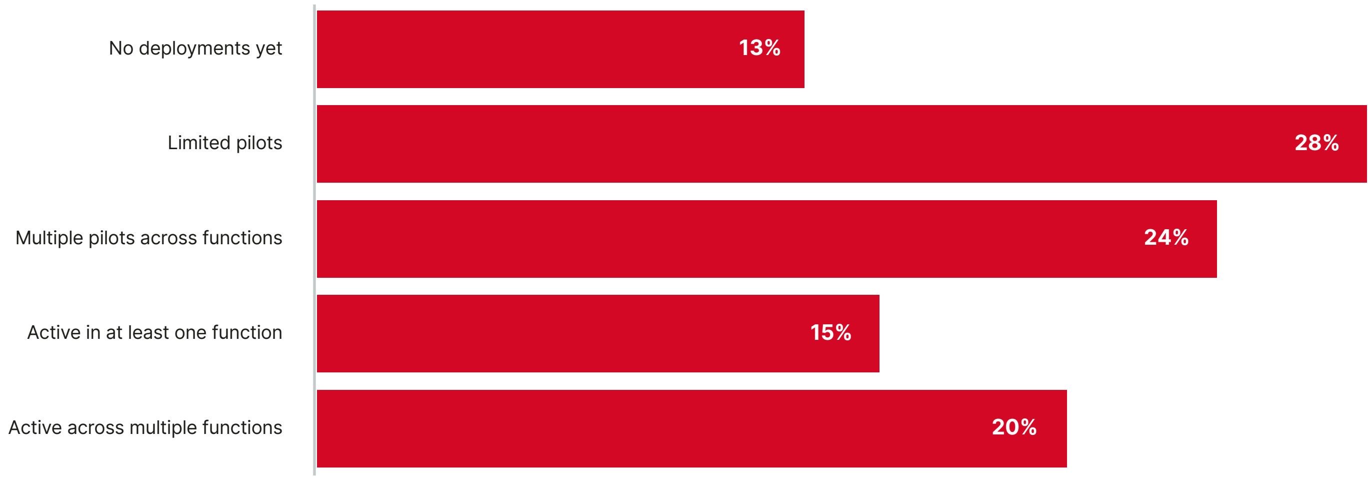
Despite these barriers, the industry appears deeply committed to the AI future. Multiple deals across 2025 testify to this. For example, we saw NVIDIA invest $1 billion into Nokia to accelerate AI-RAN innovation and assign a similar amount to a partnership with Deutsche Telekom to building a so-called AI Factory. In South Korea, SK Telecom is creating an AI platform company, while Singapore-based Singtel is building regional AI-ready facilities.

So how is traditional and agentic AI impacting the different components of the telco operation? How advanced are the implementations? Where are the wins? What are the challenges? Where are the KPIs?

Find out here.

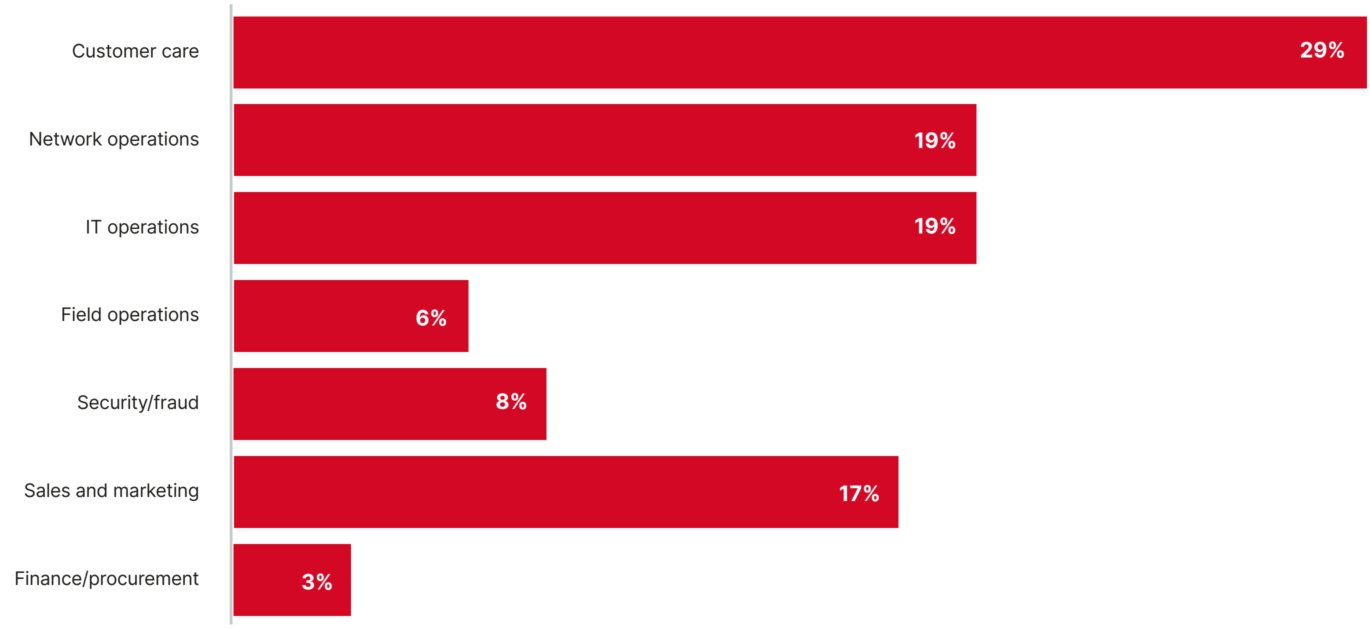
How would you describe your organisation's current level of AI maturity?

The survey reveals considerable variation in AI readiness. Overall, we can conclude that experimentation is the dominant approach. 28 percent of respondents say they are conducting limited pilots, with 24 percent pursuing multiple pilots across different functions. This combined 52 percent is well above the combined 35 percent that are now engaged in live deployments (20 percent active across multiple functions and 15 percent in at least one function). Perhaps a key challenge is understanding which use cases will bring the most business value. A small but not insignificant 13 percent reported no AI deployments yet', suggesting a minority of organisations are still in planning or evaluation stages, possibly due to cost, skills gaps or strategic priorities (see question five for more insight on these barriers.)



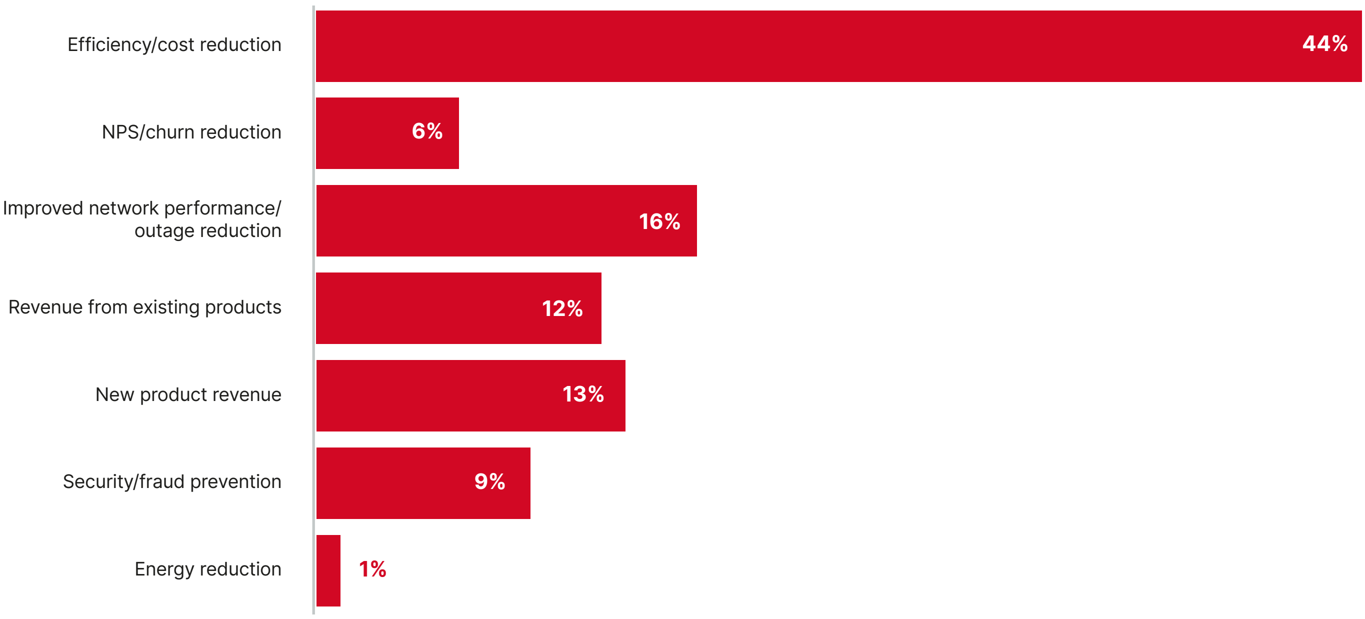
Where will AI/Agentic scale fastest in your organisation in 2026?

The GSMA's own research paper in mid-2025 revealed customer care as the leading area for AI scaling. This new survey backs up the finding. Here, 29 percent of respondents cited customer care, reflecting the compelling business case for AI virtual assistants as a big improvement on pre-scripted chatbots. Network operations and IT operations were the next most cited options (each at 19 percent), highlighting the opportunity for AI to optimise network performance, predict failures and automate routine maintenance tasks. 17 percent cited sales and marketing, security and fraud prevention accounted for 8 percent, field operations 6 percent, and finance/procurement just 3 percent.



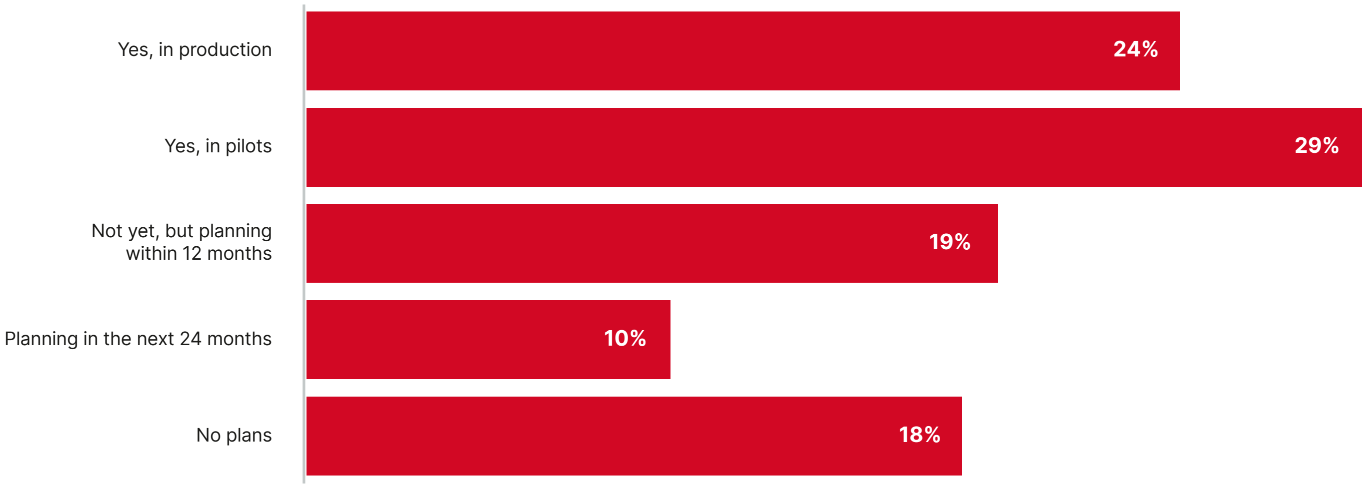
Which KPI will you use to judge AI/Agentic success in 2026?

If the question above suggests that customer care is the top priority for AI deployments, we might assume that customer satisfaction/loyalty might be the key objective. Perhaps not. When asked for their top KPI, the overwhelming choice was efficiency and cost reduction. Nearly half of respondents (44 percent) selected it, demonstrating that organisations view AI as an efficiency tool rather than one for revenue generation. In a related finding, 16 percent cited improved network performance and outage reduction. By contrast, about a quarter of organisations are measuring AI success through top-line growth. New product revenue represented 13 percent, while revenue from existing products was chosen by 12 percent. Perhaps surprisingly, just 9 percent chose security and fraud prevention.



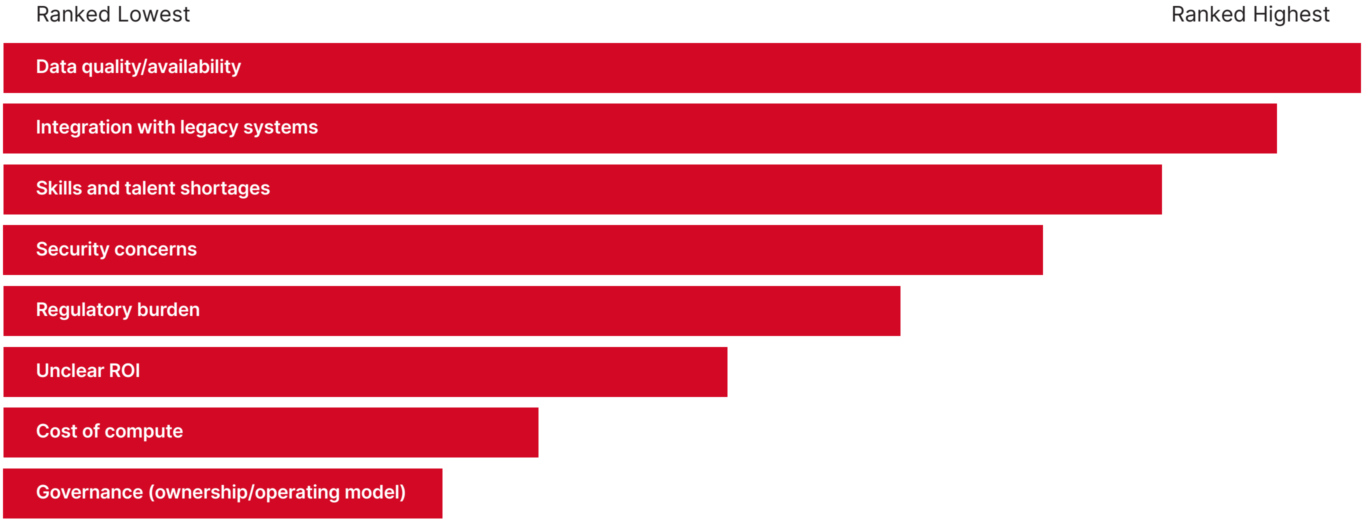
Are you deploying AI agents to execute workflows/generate content?

There's little doubt that agentic AI is the new new thing. And it's in the enterprise that the roll out of autonomous task-performing agents is progressing fastest. So how is that working out for telcos? Our survey reflects the embryonic nature of the space. For all the hype, just 24 percent have live agents in production. Experimentation is much more prevalent. 29 percent are running pilots, 19 percent have plans for deployment within 12 months and one in ten expect to deploy within two years. A not insignificant 18 percent have no current plans, possibly reflecting concerns about security, governance and ROI.



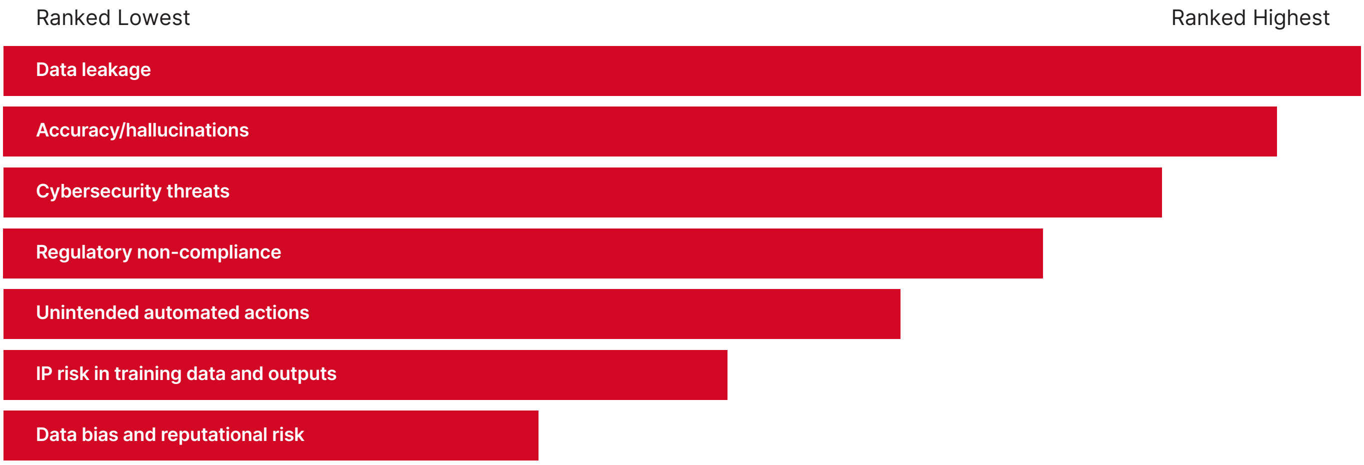
What are the biggest barriers to scaling AI/Agentic across your organisation?

The survey asked respondents to rank eight potential barriers to AI scaling from most to least significant. The results reveal that technical and data challenges dominate their concerns, while strategic and organisational issues rank surprisingly low. Data quality/availability was the factor cited by most as the top barrier, with integration with legacy systems at two. These answers reflect the challenge of poor training data quality, inconsistent formats and data silos. Below these concerns were security and skills shortages. This is unsurprising given the fierce competition for talent in this new domain. Much less of an immediate concern are regulation and governance. It seems self-evident that these factors will play a key role in the future of agentic AI, but for now they are not a priority. Indeed, governance was the overwhelming top choice when respondents were asked to name their lowest barrier to scaling AI.



What are your top AI/Agentic risk concerns in 2026?

When it comes to AI there is no shortage of catastrophic risk warnings. They even extend to the end of humanity. Telcos might not factor that one in, but they do have many rational concerns. Our survey revealed data leakage to be the paramount risk with the most first and second place rankings of all factors. Organisations obviously fear AI systems could expose sensitive customer information and proprietary business data. This is completely understandable in a sector with access to so much sensitive data. Next came accuracy/hallucinations. Again, not a surprise given how false outputs can damage customer trust or compromise network operations. Predictably cybersecurity threats also registered as a key telco risk factor. And lower priority risks? At this early stage for AI, it appears that telcos are less worried about intellectual property breaches, data bias and reputation. It seems these ethical concerns as less immediate than technical/operational threats for now.



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The *Mobile World Live* 2026 Industry Survey confirms BMC Helix's own findings across our global CSPs and telco customers: AI is no longer experimental. It's scaling rapidly, especially in customer care and network and IT operations, and success depends less on deploying AI everywhere and more on selecting the right high-value use cases.

BMC Helix helps CSPs identify and prioritise the most valuable AI and agentic use cases and uses frameworks like the TM Forum's Autonomous Networks Project (ANP) to create projects with measurable efficiency and cost reduction KPIs versus isolated pilots.

We agree that data quality and legacy integration continue to be a challenge, and our bring-your-own-LLM model addresses governance and regulatory concerns out of the box.

As telcos move from experimentation to scale, disciplined, proven use cases and production-ready, agentic platforms like BMC Helix will be integral to their success with AI

Cloud and edge

It's fair to say the migration of the telco business from proprietary, hardware-centric architectures to cloud-based and edge-distributed models is well under way. The shift makes MNOs more agile and gives them the ability to support new, latency-sensitive digital services.

It cuts costs too. Functions that once ran on dedicated hardware in central offices (packet core elements, firewalls, session control etc) can run as software on virtual machines or containers instead. This supports a shift from capex to opex so companies can pay only for what they use. The long term savings from replacing physical network infrastructure with virtualised software are undeniable.

Migration to the cloud also opens the possibility of edge computing. By processing data closer to the source of its generation – whether that's IoT devices, mobile phones, or local edge servers – MNOs can reduce latency, conserve bandwidth and improve response times. Just as important, they can boost privacy and security since sensitive information does not have to traverse the internet on its way to a central server.

This is a huge structural shift for the industry. But migration won't be cheap. According to Omdia, global spending on telco network cloud infrastructure and software is projected to grow from $17.4 billion in 2025 to $24.8 billion by 2030.

Such a huge outlay poses a fundamental question for telcos. To what extent should they build this infrastructure themselves? Or, if they choose to find partners, is the public cloud a viable option?

In recent years, high profile deals have indicated rising demand for public cloud. Vodafone and Telefónica have both moved significant parts of their 5G core onto public cloud platforms, while DISH teamed with Amazon Web Services to launch a fully public cloud-based 5G network. AT&T partnered with Microsoft Azure to host edge-cloud data centres. Bell Canada agreed a major alliance with Google Cloud.

Omdia expects the proportion of public cloud usage for network workloads to rise from 3 percent in 2024 to 13 percent by 2030.

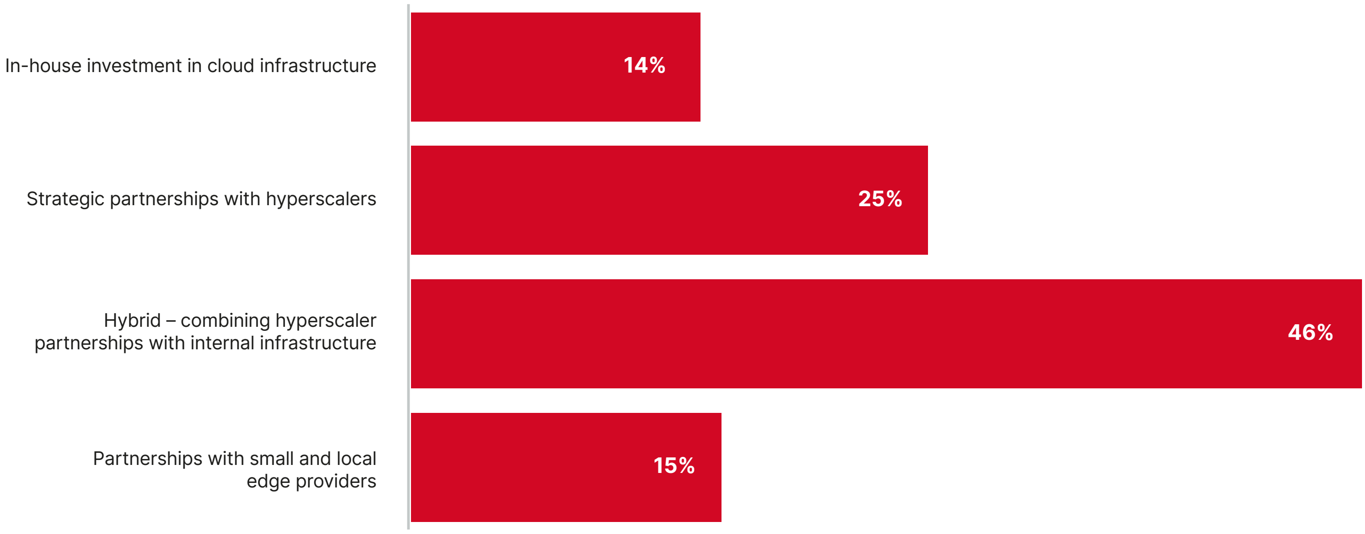
But this is not the only way to do it. Other telcos prefer a private strategy. One of the most visible is Japan-based Rakuten Mobile. It was one of the first truly cloud-native telcos. It hosts virtually all of its network functions and OSS/BSS system on private cloud infrastructure.

Of course, on a much more micro level, the emergence of cloud services gives telcos a revenue opportunity. MNOs can offer cloud-based consumer products, which boost income, increase loyalty and reduce churn.

In this chapter, we find out how the *Mobile World Live* readership is facing up to the cloud/edge challenge, how it chooses partners and to what extent it is committed to consumer-facing cloud services.

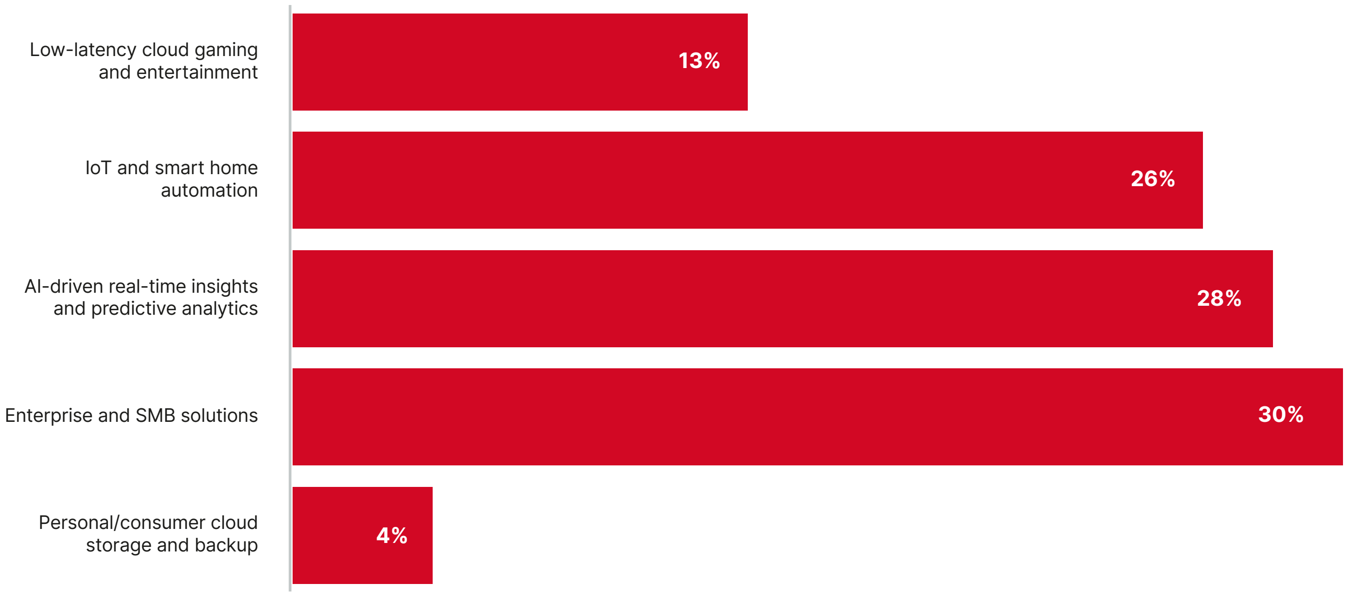
How should MNOs accelerate their 5G and edge capabilities?

The survey makes it pretty self-evident that, when it comes to cloud and edge, telcos can't go it alone. Just 14 percent of respondents believe they can pursue a policy of in-house investment in cloud infrastructure. By contrast, the remaining 86 percent all favour partnerships with specialists. The most, 46 percent, favour a hybrid approach of combining hyperscaler partnerships with internal infrastructure, while 25 percent believe strategic partnerships with hyperscalers are the way forward. The remaining 15 percent are possibly reticent about teaming with giant hyperscalers. Instead, they plan to build with small and local edge providers.



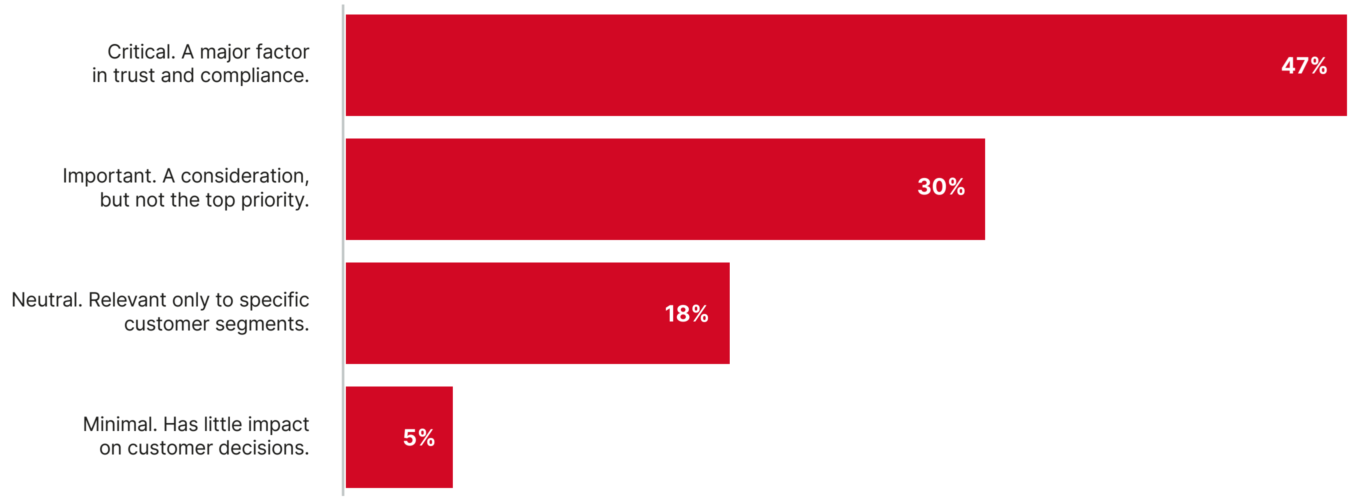
Which 5G and edge uses cases present the greatest growth opportunities?

All this investment in cloud and migration has to deliver something, right? Our survey suggests that, when it comes to new edge-related business, the enterprise sector has the clear lead over the consumer space. In all, 58 percent selected enterprise applications, with 30 percent choosing enterprise/SMB solutions and 28 percent opting for AI-driven real-time insights and predictive analytics. Meanwhile 26 percent chose IoT and smart home automation. This reveals some continued belief in home automation despite many false starts in the space. Just 13 percent are most excited about low-latency cloud gaming and entertainment, while personal cloud storage was selected by just 4 percent.



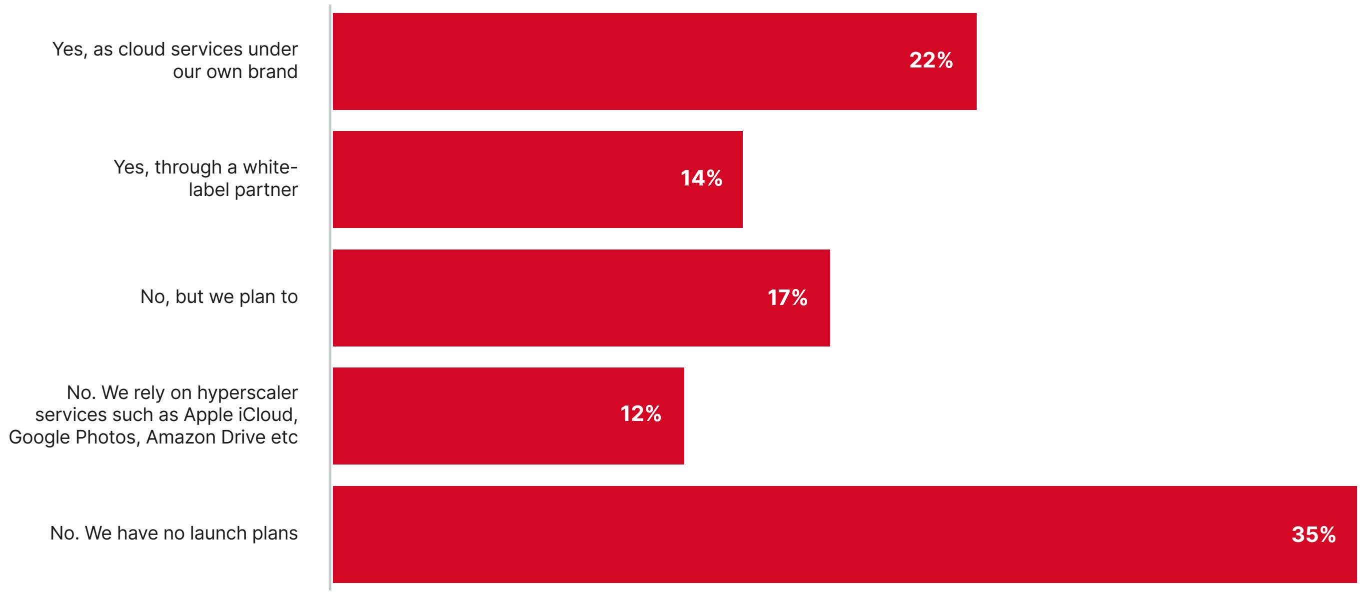
How significant is data sovereignty and in-country cloud storage for your consumers?

The migration to cloud raises weighty questions about data sovereignty. To be more specific, should we allow sensitive data to fly across jurisdictions that are subject to different laws? Countries are starting to take this question seriously. One BCG report projected that, by 2028, 65 percent of nations will implement a digital sovereignty plan. Our survey reflects the generally high levels of concern around this topic and the regulatory impact of ignoring it. It revealed that 47 percent consider data sovereignty to be a major factor in trust and compliance. 30 percent agreed it is important but not the top priority, 18 percent are focused only on how sovereignty impacts specific customer segments, while 5 percent think it has minimal impact. Overall, the answers suggest there may be a market opportunity for operators which can tailor cloud services around local data storage and regulatory compliance.



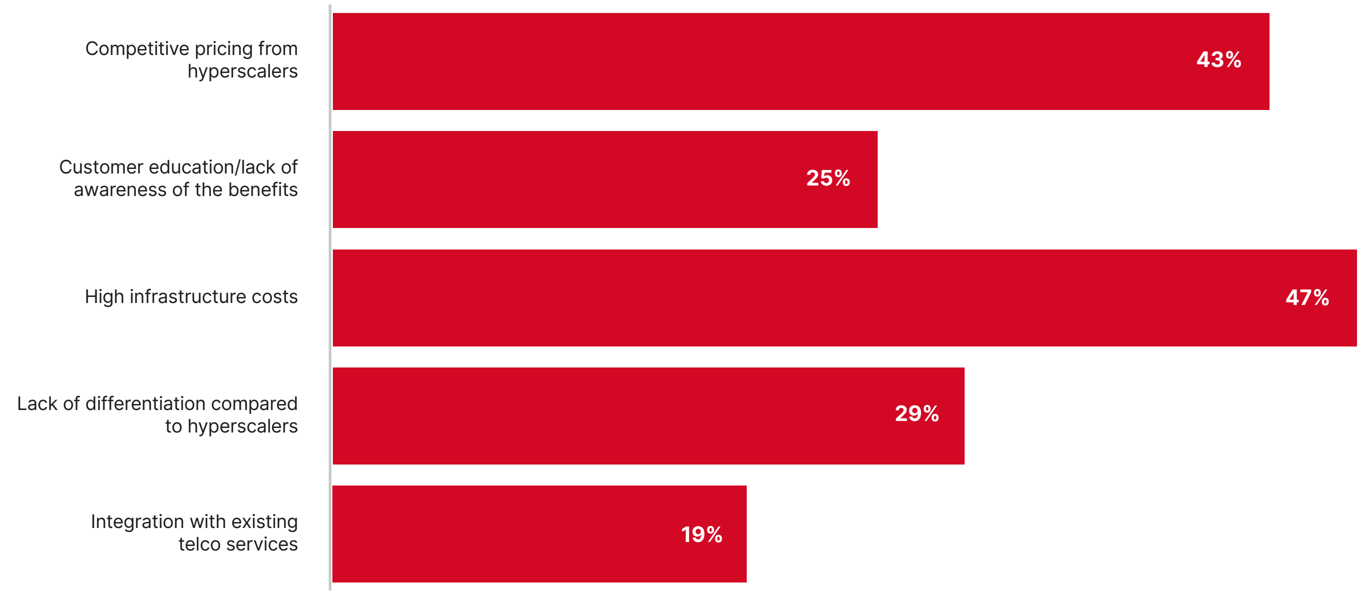
Do you currently offer branded consumer cloud services to your subscribers?

Telcos have historically looked for products to add to their consumer portfolios. They have the advantage of ready-made marketing programmes and mature billing processes. Can cloud-based services provide a new revenue stream? Possibly, but there's no single dominant model for this. Our study found 22 percent of respondents already offer cloud services under their own brand, with 17 percent planning to do so. White-label partnerships accounted for 14 percent while those relying on hyperscaler services comprised 12 percent. A significant 35 percent have no plans to launch branded consumer cloud services, suggesting many MNOs have effectively ceded this market to hyperscalers like Apple iCloud, Google Photos and Amazon Drive.



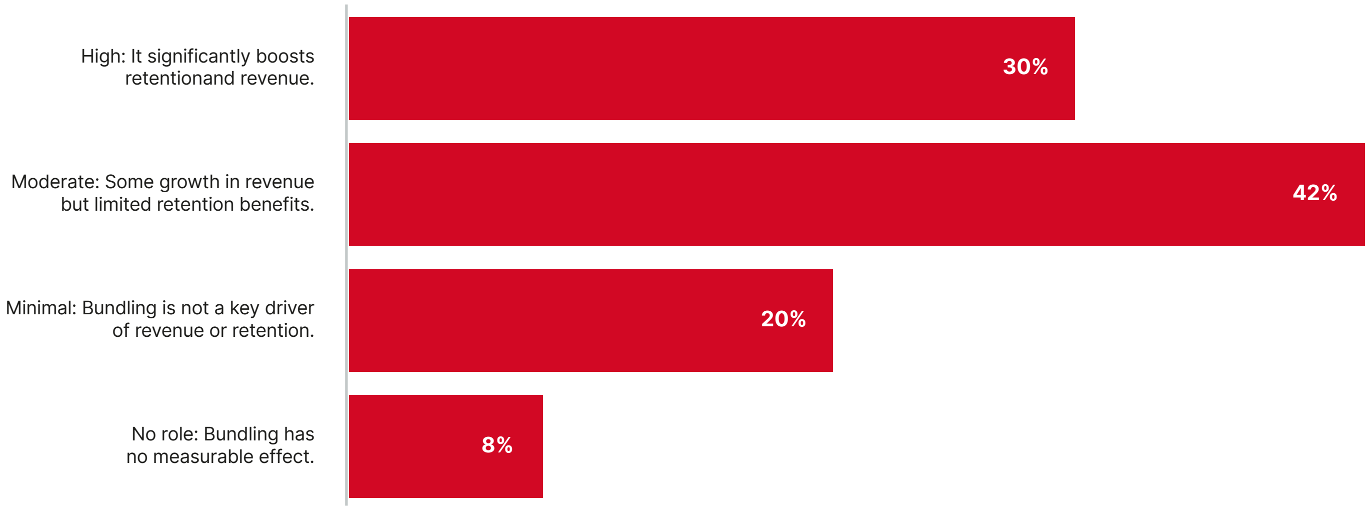
What are the biggest challenges for MNOs when monetising consumer cloud services?

The finding above that 35 percent have no plans for branded consumer cloud services suggests there are barriers to monetising the space. So what are they? High infrastructure costs emerged as the top challenge at 47 percent with competitive pricing from hyperscalers at 43 percent. A further 29 percent feel hindered by a lack of differentiation with hyperscaler products. All these findings reflect the sizeable challenge of competing against hyperscalers with global economies of scale, the ability to subsidise, the option to pre-install and the freedom to integrate seamlessly with popular applications. 25 percent cited customer education and lack of awareness while 19 percent see integration with existing telco services as the main challenge.



What role does bundling cloud services play in driving revenue and reducing churn?

Bolting on premium services is a time-honoured way to attract new customers and keep them. Do cloud services fit into this model? The survey implies they do, to a degree. 30 percent said they can significantly boost retention and revenue, while the biggest group (42 percent) agree that cloud services can deliver some revenue growth but limited retention. One in five respondents think they have minimal impact, while 8 percent cite no measurable effect at all from bundling strategies.



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