Research Agenda
Q4 2024, Q1 2025

DATE

September 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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Q4 2024 – industry research

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

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Q4 2024 – regional, economic and social research

	Region in Focus	The Mobile Economy	Economic and Social Impact	Industry Megatrends
Major reports	Asia Pacific	The Mobile Economy North America 2024	Africa: rural energy and financing strategies	AI – energy efficiency
	China	The Mobile Economy Sub-Saharan Africa 2024	Digital Nations Asia Pacific	AI – strategy and culture
	Europe	The Mobile Economy Middle East and North Africa 2024	Fintech strategies	GSMA Open Gateway: State of the Market
	Latin America		Renewables access: new models	Open Gateway commercial strategies: Asia Pacific
	Middle East and North Africa		5G in Africa 2024	Radar: satellites and D2D
	North America		Tech in Ghana	B2B opportunity – financial services, manufacturing, automotive and aviation
	Sub-Saharan Africa		Mobile network use in Latin America	Telco security landscape and strategies: North Africa
			Network use fees: myths and realities	Telco security landscape and strategies: Southern Africa
			Digital Africa Index	Telco security landscape and strategies: Europe
			QoS Regulations in Asia Pacific	Telco security landscape and strategies: Asia Pacific
			Spectrum pricing: Türkiye, Egypt	
			Mobile money: digital finance for all	

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Q1 2025 – industry research

	Mobile Operators & Networks	Fixed, TV & Convergence	IoT & Enterprise	Digital Consumer	Spectrum
Data	**Mobile markets** Quarterly forecast update: connections and revenues (to 2030) **VoLTE/VoNR** Forecast update: launches and connections (to 2030)	**Fixed and pay-TV markets** Quarterly forecast update: connections (to 2030) **Fixed and pay-TV markets** Quarterly product tracker update: commercial services	**Cellular IoT markets** Quarterly forecast update: licensed cellular IoT connections (to 2030) **Operators in Focus** B2B opportunity (dashboard, survey-based)	**Consumers in Focus** Consumer behaviour for devices (dashboard, survey-based)	**Spectrum intelligence** 5G and previous generation networks (auctions, assignments, pricing, spectrum migration) **Network sunsets** Tracker of operators switching off 2G and 3G networks (with outlook to 2030)
Major reports	**5G in Context** Global 5G and network landscape (quarterly series) **Non-terrestrial networks** Trends and developments across networks, spectrum, partnerships, use cases and more (quarterly series)	**Fixed and pay-TV markets** New developments and future outlook (quarterly series) **Fixed broadband state of the market and outlook** Service, competition and technology developments and trends disrupting the market	**From telco to techco** Operator progress beyond connectivity, revenue growth, new trends and developments **IoT ecosystem revenue outlook** Trends and drivers shaping revenue growth through to 2030 **Operators in Focus** B2B opportunity: operator strategies, plans and expectations (survey-based)	**Outlook for consumer devices** Major consumer behaviour trends disrupting the devices market (survey-based)	**Spectrum landscape** New insights and trends to watch (quarterly series) **Network sunsets** Pace of 2G and 3G network sunsets globally and by region, with drivers and outlook to 2030 (quarterly series) **Network landscape** Network developments: trends and insights (5G SA, NTNs, open RAN, VoLTE and more) NEW
Other research	**Spotlights:** weekly reports covering important trends, developments and events in the telecoms/digital ecosystems and their implications **Insightful charts**: a monthly graphic providing a visual way of telling an important story or development in the industry – turning data into insights **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				

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Q1 2025 – regional, economic and social research

	Region in Focus	The Mobile Economy	Economic and Social Impact	Industry Megatrends
Major reports	Asia Pacific	The Mobile Economy 2025	Mobile broadband and poverty reductions in Latin America	Telco B2B opportunity – economic impacts
	China	The Mobile Economy China 2025	Mobile investment gaps: Pacific Islands	AI – network strategy
	Europe	The Mobile Economy Europe 2025	Spectrum pricing: key global trends and impacts	Global Mobile Trends 2025
	Latin America		Sector-specific taxes in Latin America	Network Sustainability Index
	Middle East and North Africa		Mobile money: how digital payments impact economic growth	Mobile Energy Efficiency Benchmark 2024
	North America			
	Sub-Saharan Africa			

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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

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Themes cutting across most content modules (research and data)

	Mobile Operators & Networks	Fixed, TV & Convergence	IoT & Enterprise	Digital Consumer	Spectrum
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

GSMA Intelligence: our content, data, research and value

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

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