

## Webinar:

# What Mattered in 2025: Opensignal Analyst Wrap-up



10 December 2025 | 13:00 EST



**Sylwia Kechiche**

Senior Director,  
Industry Analysis

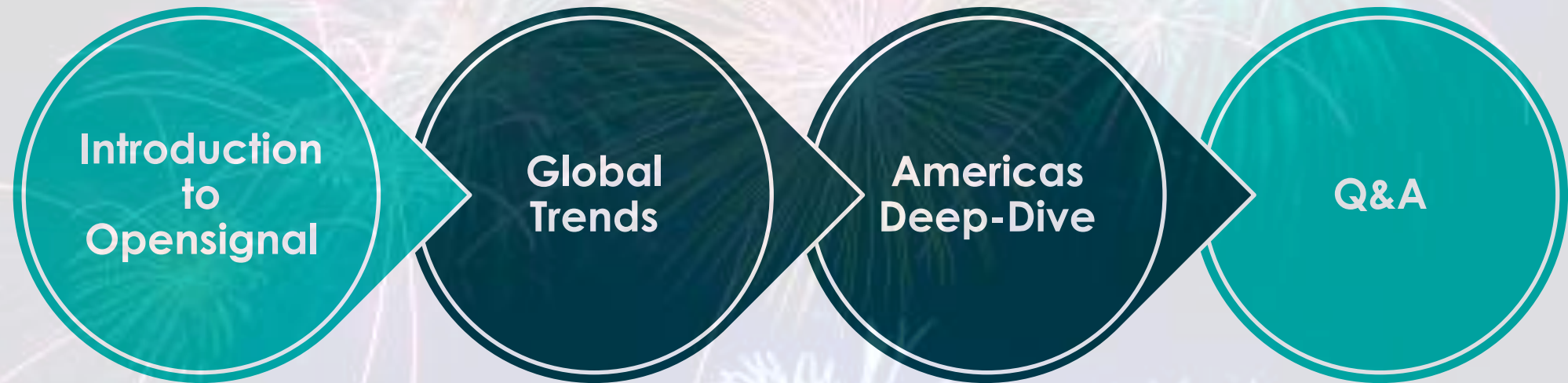


**Fiona Armstrong-Mills**

Principal Analyst,  
Americas

# Agenda

What will we cover over the next 45 minutes



# Global reach, global expertise and global insight



**118**   
operators in over 50 countries

**billions**   
of crowdsourced network data points collected

**170+**   
Mobile, broadband and market  
insight reports published in 2024

Interested in working with Opensignal? [Contact us here.](#)

# Opensignal supports operator marketing, sales, and network teams



## For Sales and Marketing Professionals

Independent Brand  
Validation

Retail and Digital  
Sales Enablement

Subscriber Market Share  
and Churn Analysis

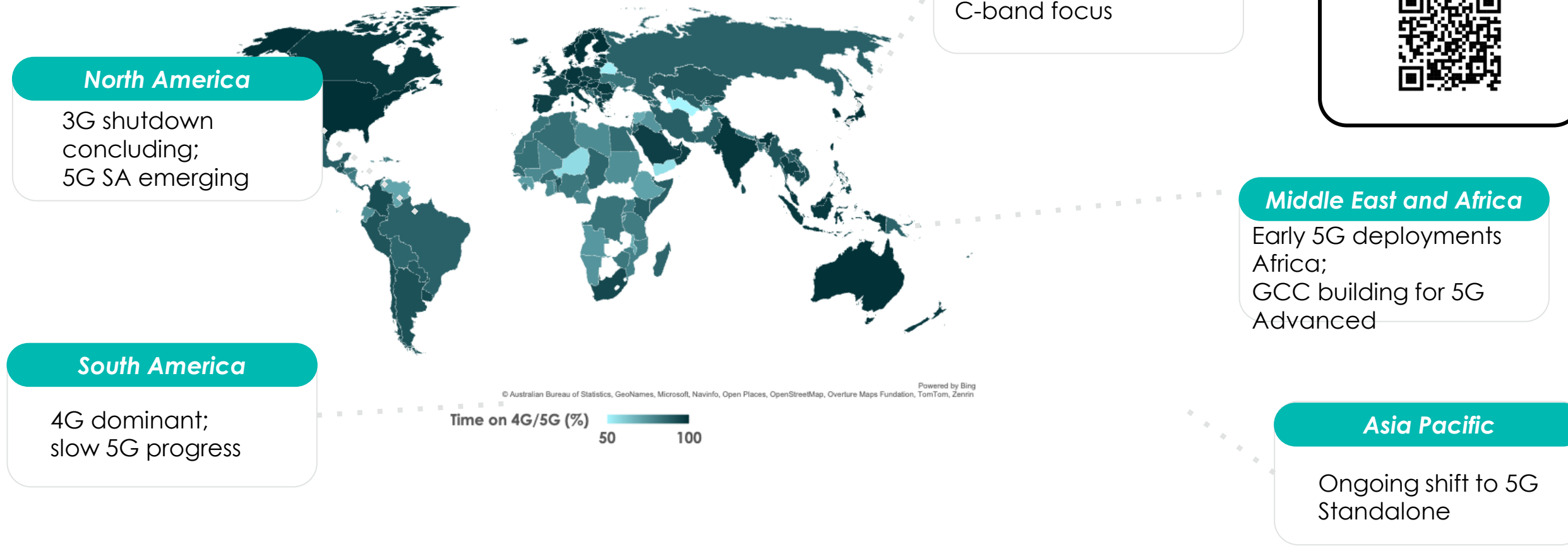


## For Wireless and Broadband Network Teams

**Network Experience Insights & Actions**  
for Executives, Benchmarking Teams, and Engineers



# State of Network Evolution



## North America

3G shutdown concluding;  
5G SA emerging

## Europe

5G maturing;  
C-band focus

Scan for more insights



## Middle East and Africa

Early 5G deployments Africa;  
GCC building for 5G Advanced

## South America

4G dominant;  
slow 5G progress

## Asia Pacific

Ongoing shift to 5G Standalone

© Australian Bureau of Statistics, GeoNames, Microsoft, Navinfo, Open Places, OpenStreetMap, Overture Maps Foundation, TomTom, Zenrin  
Powered by Bing  
Time on 4G/5G (%) 50 100

# Operators have largely struggled to monetise 5G at scale with existing propositions

## Consumer services



Speed-based consumer 5G **tariffs and contract tiering**



**Network “Boost”** for enhanced gaming and content performance



**‘Event experiences’** – VR stadiums and augmented events



**Fixed line resilience** – 5G backup connectivity

## Enterprise solutions



Hyper-connected and automated **smart factories and cities**



**Private networks and slices** for enterprises



**Remote healthcare** and patient monitoring



**Autonomous transportation** and logistic services

# More than **150 operators** across **76 countries**

have launched some form of commercial 5G FWA as of March 2025, as per the GSMA. FWA delivers value across a range of uses:



## Targeting new fixed broadband users

- Primary broadband
- Underserved/rural areas



## Competing on service quality/value

- Competing with cable providers on cost
- Offering better value and speed to xDSL subscribers



## Complementing fiber offerings

- Dense urban environments (MDUs)
- Redundancy and failover as an optional upsell for premium subscribers



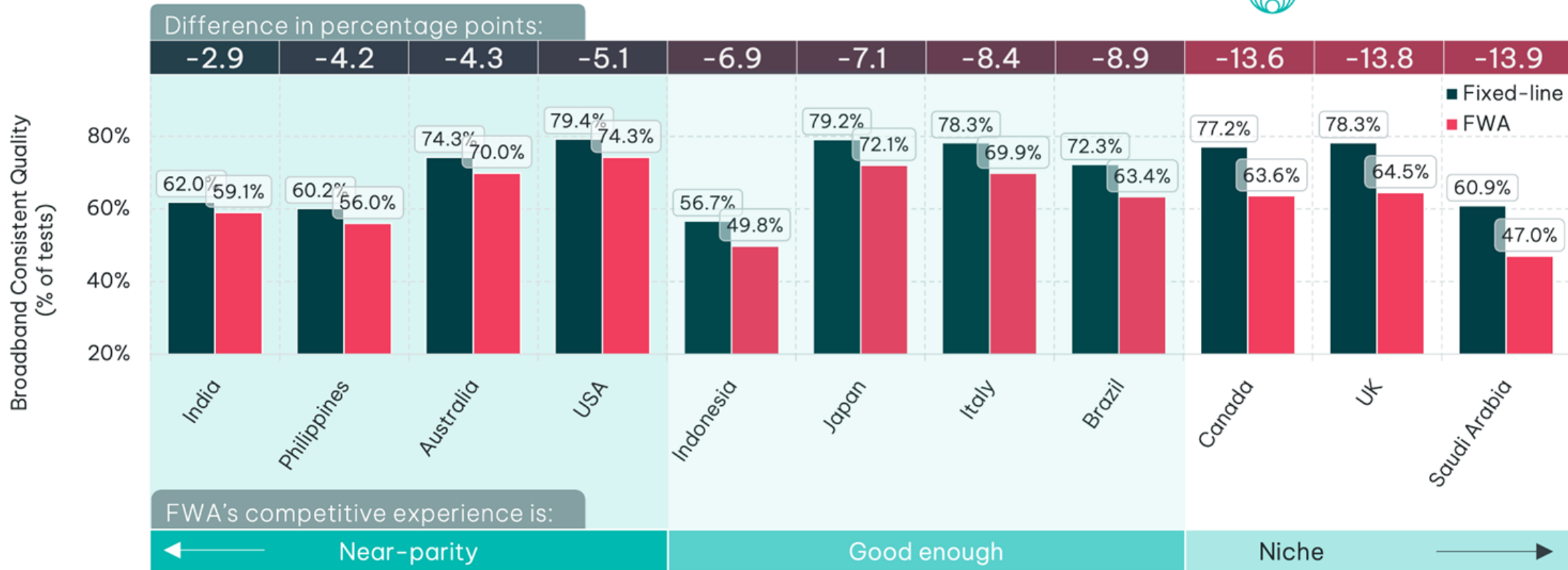
## Addressing wider use cases

- Secondary or vacation homes
- Small & Medium Businesses (SMB)

# FWA offers a mix of experience

In a handful of markets, FWA experience is almost on par with fixed-line

Scan for more insights



With relatively small difference compared to fixed-line, FWA acts as a direct alternative

When experience on FWA falls short compared to fixed-line, it acts as a bridge for access gaps

# Wi-Fi home gateways are often the hidden bottleneck in broadband experience

Access technology is no longer the main constraint in many markets

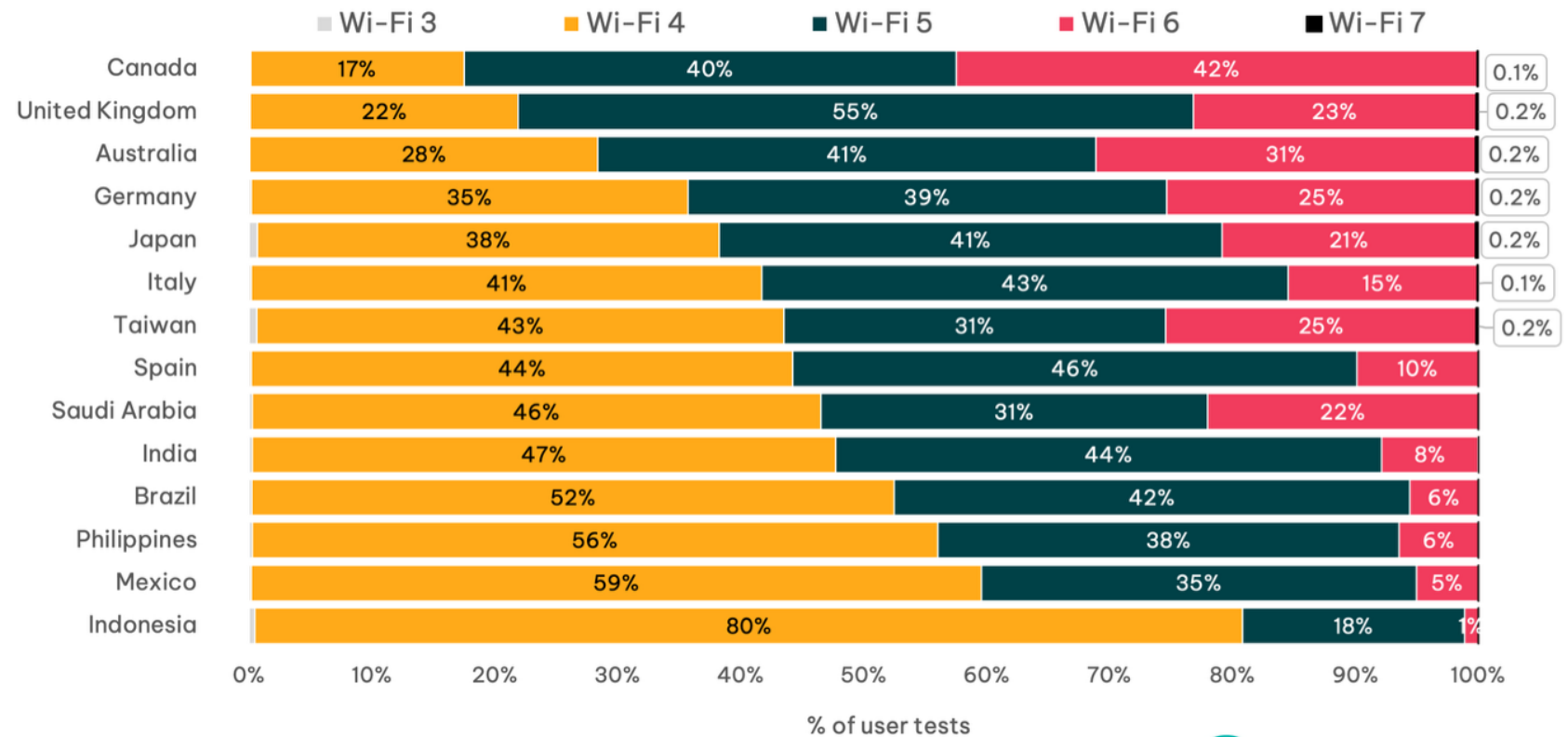
In-home Wi-Fi environment is a differentiator for ISPs

Gateways & customer premises equipment strategy directly shape user experience

Scan for more insights



Time spent connected to different Wi-Fi generations as measured by our users; Q3 2025



Source: Opensignal | Using data collected over period: 01 July – 29 September 2025 (90 days)

# AI in telecoms: a dual strategy

## Cost reduction & efficiency

Focus: Immediate OPEX reduction and "Zero-Touch" operations



Generative AI for IT & Coding



Agentic AI in Customer Service



Predictive Network Maintenance



Operators like Telefónica and AT&T are targeting billions in savings here. The buzzword for 2025 is **'Agentic AI'** – systems that don't just chat, but do

## The Growth Engine

Focus: Validating new revenue streams beyond connectivity



AI Infrastructure as-a-Service



Dynamic Bundling & Micro-Monetization



Sovereign AI Platforms



AI is the primary tool being deployed to reverse decrease in APRU through personalization and dynamic pricing



# The structural pivot: from connectivity provider to AI-First business

## Structural transformation (Organizational Shift)



### MNO-AI Split:

- **MNO CIC** (efficiency)
  - **AI CIC** (growth)
- \$3.6bn AI revenue by 2030



### Separate AI Business Units

Singtel / Nxera



### Data & AI as a Core Vertical

Telus International's Data & AI solutions unit

## AI infrastructure and CapEx (The Compute Provider)



### The AI Factory

€1 Billion+ investment in NVIDIA GPUs



### Sovereign Data Centres

AI-ready, sovereign data centers across the region



### Cloud-Native RAN Automation

fully cloud-native driven by AI automation in the RAN

## Sovereign AI Advantage (Trust Provider)



### GDPR-Compliant Platform:

- partnered with European LLMs like Mistral AI



### Financial Services AI

Advanced AI for fraud detection and risk scoring for M-PESA



### Bespoke Industry Solutions

AI services + **KT Cloud AI** platform for specific industries

# Americas



5G progress remains steady



D2D is growing, lead by Starlink partnerships with T-Mobile and others



Satellite internet works alongside FWA, performing well in rural areas



FWA drives US broadband growth, creating demands on 5G networks



Specialization and consolidation the keys to sustainable growth

# 5G progress remains steady

## Operators eye 5G SA as more spectrum auctions are planned

Based on GSMA Intelligence:

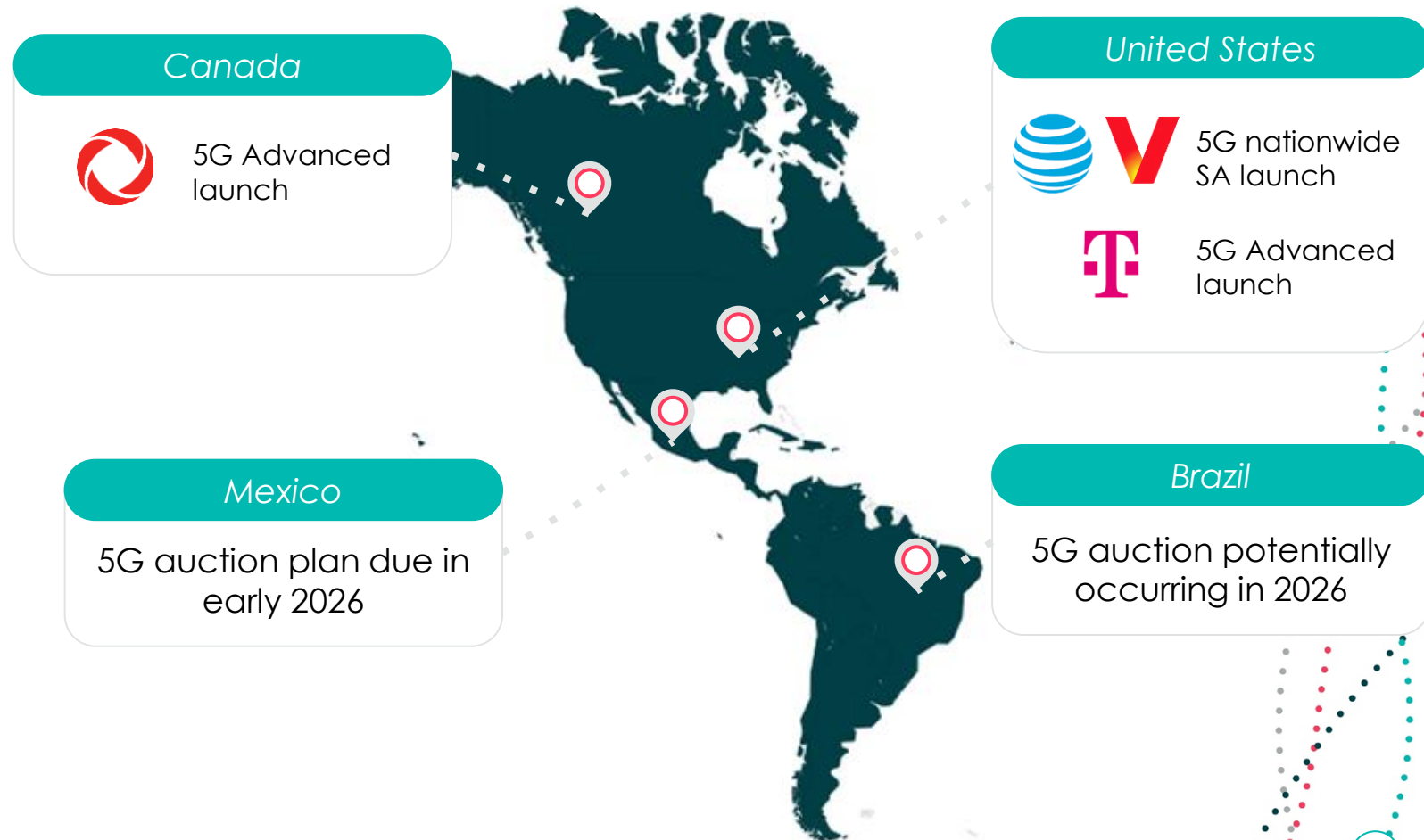
**49%**

of countries in the region  
have 5G

Of countries with 5G

**19%**

have at least one  
commercial 5G SA  
deployment

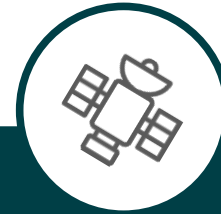


# D2D enters the market in earnest

Starlink emerges as the first satellite partner to have services ready for data



Areas of no signal on mobile persist across the region



D2D commercially launched in the US, with limited launches in Canada, Chile and Peru.



Starlink is the key provider behind current public launches, but partnerships with AST SpaceMobile, Viasat, Skylo, Amazon and Lynk are on the horizon.

***With D2D services rolling out, operators must set realistic consumer expectations to mitigate disappointment over perceived value or performance.***

# Starlink Internet has been instrumental in extending broadband connectivity...

Alongside FWA, satellite internet works to fix under-connected areas



FWA provides a more consistent experience than Starlink in urban areas of Canada by **+16pp**

However, Starlink outperforms FWA by **+3pp** in Consistent Quality in rural areas.

Scan for more insights



# ... while FWA continues to grow

## FWA gains user popularity while operators widen deployments and integrate alongside fiber

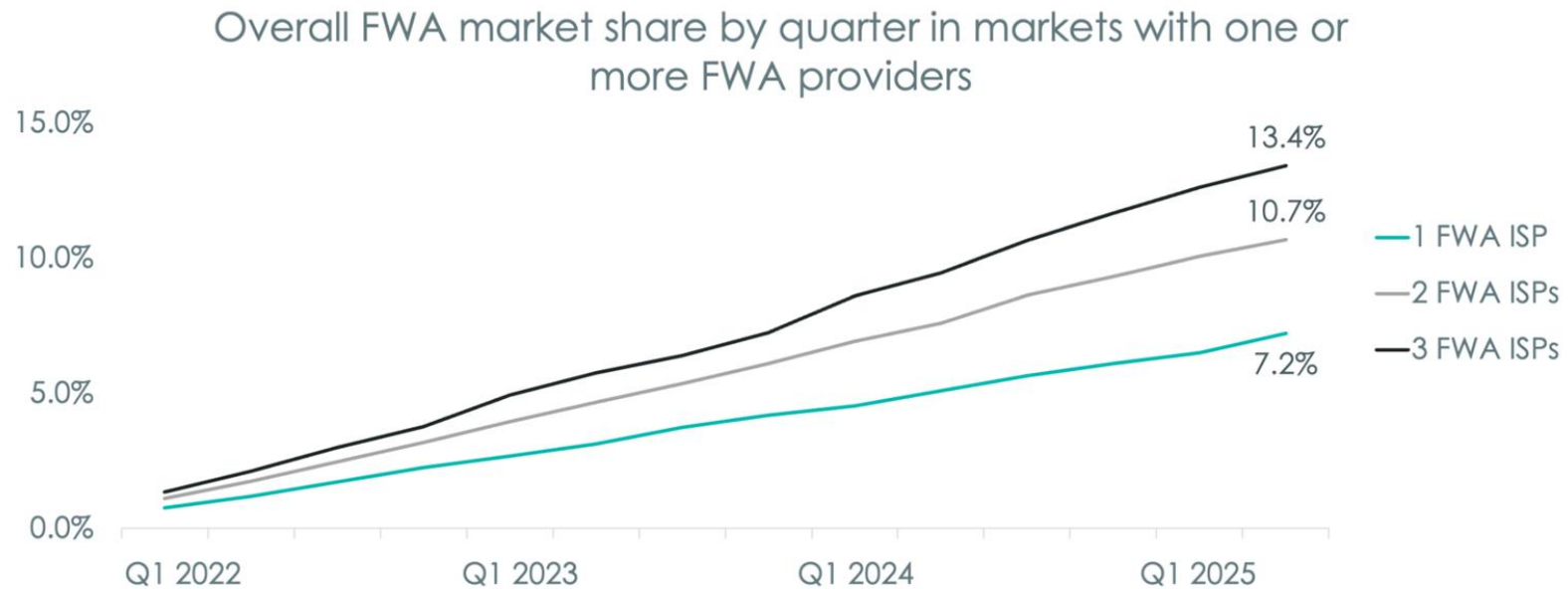


FWA is becoming more deeply integrated into the fixed broadband landscape



FWA growth is now an important factor in spectrum acquisition decisions for operators

More FWA providers lead to a higher market share for FWA within a given market.



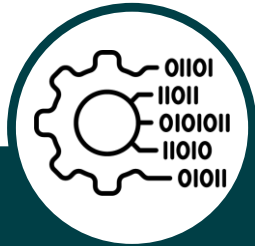
Data shows market share aggregated for all FWA providers in a market for areas with at least one FWA provider from Q1 2022 through Q2 2025 | © Opensignal Limited

Scan for more insights



# Three forces reshaping the telco landscape in the Americas

The Americas account for **84%** of global telco M&A value so far in 2025, according to [Bain & Company](#)



## Specialization

Wholesale networks in Brazil boost fixed broadband penetration and performance

BAIT mobile success in Mexico reflects its specialization in the low-cost market



## Consolidation

Telefonica's ongoing exit in LATAM offers opportunities for market stabilization

Charter and Cox merge in the US as cablecos feel the squeeze from FWA



## Convergence

US mobile operators improve their converged offering:

AT&T buying EchoStar spectrum for FWA  
 T-Mobile buying Lumos and Metronet  
 Verizon buying Frontier and Starry



OPENSIGNAL



Interested to learn more?

Visit our website to read the latest insights  
<https://insights.opensignal.com/market-insights>



Attending MWC26?

Book a meeting with us to learn how our insights  
can help you drive commercial success

# Q&A