

Top takeaways from MWC 2025

Kearney's take on the key themes from the largest telecom event of the year

#1 AI everywhere—the new reality

AI is no longer just a buzzword, rather it is enhancing seemingly every offering out there. Where last year's AI conversation largely revolved around large language models (LLMs) and their potential, the focus has now shifted toward implementation. AI is moving deeper into networks, including into the RAN, and will soon operate as agents directly on devices, acting as an intelligent abstraction layer, simplifying the complexity of the countless apps we have all accumulated.

The excitement is palpable (and so was the marketing around it), but it remains to be seen how telcos will be able to successfully harness the new capabilities and embed them in their operations. Here we see advances in AI-powered network automation, hyper-personalization of services, and enterprise solutions as key opportunities, as well as very creative concepts, such as using excess computing capacity (GPUs) at the mobile edge (MEC) for accelerating AI as a service.

#2 Market structure—enabling sustainable growth

With increasing capital expenditures and challenges to grow revenues (see our [new report](#) on how everything seems to be getting more expensive except connectivity), the discussion around market structure has heated up, primarily driven by the large European operator groups, with some CEOs calling for establishing a single European market. Players are looking for decisive regulatory action to be taken, resulting in establishing an environment where investments are rewarded.

The operators are requesting bold reforms, addressing competition, spectrum policy, market structure, regulatory harmonization, and more. Connected to this is the question of how to define the marketplace itself and the fair contribution of the players within it (see our [new report](#), in collaboration with the GSMA and published during the conference, on the mobile infrastructure investment landscape, which shows how mobile operators account for 85 percent of investments).

#3 Network APIs—where the growth is

As the industry is having a hard time chasing growth, there is an opportunity showing real promise: network APIs. It is now firmly on the growth agenda as more and more telcos are openly discussing, and engaging with, this very exciting concept, but it has yet to fully take off in the marketplace. There are both demand-side and supply-side aspects to work out before the flywheel can start spinning. We are confident, however, that demand is there (see our [developer study](#) on network APIs, confirming developers want to innovate on the great networks around the world).

The supply side was front and center at the conference through operator presentations, conference floor exhibits, and the numerous private conversations we held. The positioning of aggregators was further advanced compared with last year, bolstered by the recent commercial successes from signing operator deals. Indeed, we welcome aggregators driving the shaping of this ecosystem, as today there are markets where all leading operators expose at least some network APIs, yet no two expose the same service; hence, there is nothing to aggregate (see our [new report](#) on the state of 5G around the world, published during the conference). The willingness to collaborate is essential for tapping into this great opportunity.

#4 Sats and HAPS— connectivity expanding into space

Access networks are no longer confined to planet earth. We are now truly seeing satellites (sats) and non-terrestrial networks (NTNs) taking off. An obvious opportunity is how this technology completes the coverage map, connecting underserved areas; however, the NTN development has operators and other players innovating new use cases and rethinking the network topography.

We have seen NTN-based platforms for enhancing network resilience, as well as drone-based base stations for providing coverage and capacity on the spot for first responders. The integrated multi-orbit strategies that are starting to formulate—combining LEO and GEO constellations (see our [recent report](#) on taking care of space as launches are accelerating)—remind us of different uses of spectrum band classes in terrestrial networks. Further, do these high-altitude (HAPS) operations establish a new network edge?

#5 Sovereignty—driven by geopolitical dynamics

Our changing world was a discussion on and off the conference floor. Most notably, just as data centers have become increasingly core to the sector—a movement started in the virtualization era and now accelerated by the AI wave—the topic of cloud sovereignty was very present. We saw many operators—especially in Europe—pushing for sovereign cloud operating models in light of the current tensions on the world stage.

The trick will be to offer sovereignty without slowing down enablement or adoption. These themes also trigger renewed discussions about fear of split standards around the world. At the same time, these challenges may bring about innovations we would otherwise not see, such as the MEC-powered AI as a service (as mentioned in theme #1 above). It was also in the power-hungry data center realm that we were reminded of the need to design for sustainability—something that makes both environmental and economic sense.

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