

Annual Report

2025



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.

Connectivity for Good engages members, governments and civil society, to advance positive policy and spectrum outcomes, facilitate digital innovation to reduce inequalities in our world, and tackle today's biggest societal challenges such as digital inclusion, climate change and sustainability.

Industry Services and Solutions underpins the technology and interoperability that make mobile work. Via our projects, working groups and promotional activities we facilitate the industry's focus on areas such as 5G, Mobile IoT, fraud and security. And our technical services offer tools, data and resources to enable even more efficient and robust mobile experiences for users.

Outreach provides the world's largest platform for convening and informing the mobile ecosystem at MWC Barcelona, Shanghai, Las Vegas, Africa, Doha and the M360 series, and through Mobile World Live and GSMA Intelligence with breaking news, insights and expert analysis.

For more information, please visit the GSMA corporate website at www.gsma.com.

Follow us on [LinkedIn](#).

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CHAIRMAN'S FOREWORD

As we reflect on the year, it's encouraging to see the steady progress the industry has made on its strategic priorities. Together, our work is helping to shape a more connected, innovative, and sustainable future.

In 2025, the GSMA's global working groups remained prolific – bringing 8,000 industry professionals together across 777 meetings to update or release approximately 180 essential documents. New groups including the AI Observatory and 6G Task Force were formed to align members behind common goals and inform future standards.

Reaching the full potential of 5G remained a core priority. Our 5G Future Community reached over 2,000 leaders to explore new possibilities unlocked by 5G Standalone and 5G-Advanced. These networks will power the next wave of enterprise services, with significant opportunities for operators in all markets.

It is also encouraging to see progress made in closing the digital divide. Work continued with our Handset Affordability Coalition, a further 5.5 million people learned basic digital skills through the Mobile Internet Skills Training Toolkit, and through the Connected Women Commitment Initiative, 5 million additional women were reached with mobile internet and/or mobile money services.

We also continued our support of enterprises in low- and middle-income countries through the GSMA Innovation Fund. In 2025, two new Funds were launched targeting solutions for humanitarian challenges and innovation at the intersection of AI and mobile connectivity.

As we look ahead, the Annual Report is an important reminder of the GSMA's role in driving impact for the industry, governments and communities around the world. I look forward to continuing to build on these achievements in 2026.

Gopal Vittal

GSMA Chair
Executive Vice Chairman, Bharti Airtel Limited



DIRECTOR GENERAL'S FOREWORD

In a year defined by unpredictability and rapid change, mobile remained a force for progress. At the GSMA we continued to deliver on our mission by investing for the industry, driving impact for members and delivering impact for the world.

AI was front and centre this year, and the GSMA partnered with global ecosystem players to pave the way for future services. Outcomes included benchmarks to measure telco model performance, a TelecomGPT and the first LLMs built for non-majority languages.

Online safety was another priority, as operators seek new ways to protect customers from scams and maintain trust. The United Against Scams initiative moved quickly from concept to delivery, and by year end, around 70% of baseline safeguards were in place or committed.

GSMA Open Gateway was also key to building a joined-up industry response, with identity and fraud solutions making up the majority of commercial API launches. The initiative now unites operators representing 80% of global connections, and the programme saw an impressive 200% increase in participating channel partners in 2025.

Advocacy stayed central to our work. GSMA Capacity Building trained 1,870 policymakers and regulators, and our experts drove 25 positive policy results globally in priority areas from mobile taxation to spectrum management.

All these themes and so much more were captured at GSMA events, which convened over 170,000 attendees worldwide. We celebrated a record-breaking MWC Barcelona and broke new ground with a hugely successful first edition of MWC Doha.

This Annual Report clearly demonstrates the breadth and depth of the GSMA's impact in 2025, and reinforces our ambition and energy for 2026. None of this progress was achieved in isolation, so a special word of thanks to everyone on the GSMA team, and to our members, partners and Board.

Vivek Badrinath

Director General, GSMA

Chapter 1

STRATEGY

Vision, Mission and Strategy

Today's societal, economic, and environmental challenges are more complex than ever, and the mobile industry's ongoing investment and innovation are crucial for affordable, accessible, and sustainable solutions across all geographies.

The GSMA's vision is to unlock the full power of connectivity so that people, industry and society thrive.

The GSMA's mission is to be recognised as THE global industry association for the advancement of mobile technology by representing, promoting, serving and unifying mobile operators, the broader mobile ecosystem and industries around the world who are pursuing digital transformation to deliver real impact for business and society.

The GSMA's strategy is to:

- represent our members to governments, regulators, international institutions and development organisations.

- promote the industry through reports, thought leadership, events, media and marketing channels.

- serve the industry through GSMA services, training, news, data insights and research to inform, improve and support our members.

- unify through collaboration which drives innovation, global interoperability and business opportunities.

The GSMA operates across three vertical pillars – Connectivity for Good, Industry Services and Solutions, and Outreach - all underpinned by Organisational Health activities across the organisation. Collectively these activities drive KPIs across areas of engagement, impact and financial performance.

Financial Strategy

The GSMA Group is overall not-for-profit and utilises contributions from events, services and membership fees to drive industry impact.

2025 was the second year of the GSMA multi-year financial strategy designed to take the GSMA beyond the financial recovery following the pandemic. The GSMA uniquely generates a broad portfolio of funding sources which scale member benefit. In 2025, for every £1 of operator membership fees, the GSMA generated £10 of additional funding from other sources. These funds are invested into key industry topics on behalf of its members to maximise industry impact. The Audit & Risk Committee oversees a broad programme of work to strengthen the GSMA's resiliency and safeguard members' interests.

During 2025, the GSMA concluded its comprehensive entity reorganisation programme which separates Events and Services as well as Intellectual Property and Operations into distinct entities to better safeguard GSMA's resiliency and to create a stable foundation for future growth and impact.



Chapter 2

GOVERNANCE



GSMA BOARD 2025-2026

The GSMA Board is comprised of Group CEOs, CEOs and C-level representatives from the world's leading mobile operators. Collectively they set the GSMA's strategic direction, ensuring its work is fully aligned with the needs of mobile operators and their customers across the world. The Board ensures that the GSMA's resources are focused on activities where collective action can deliver significant benefits to the mobile industry's customers, beyond those that individual operators could achieve through their own pursuits. Each Board term lasts a period of 2 years.



Frehiwot Tamru
Ethio Telecom



Ernest Lawrence Cu
Globe Telecom



Makoto Takahashi
KDDI



Young Shub Kim
KT



GSMA Chair

Gopal Vittal
Bharti Airtel



GSMA Deputy Chair

Ralph Mupita
MTN



GSMA Director General

Vivek Badrinath
GSMA



Mike Fries
Liberty Global



Bruno Zerbib
Orange



Mathew Oommen
Reliance Jio



Roberto Nobile
Telecom Argentina (now Personal)



Carlos M. Jarque
América Móvil



F. Thaddeus Arroyo
AT&T



Allison Kirkby
BT



He Biao
China Mobile



Marc Murtra
Telefónica



Benedicte Fasmer
Telenor



Pietro Labriola
TIM



Ali Taha Koç
Turkcell



Huang Zhiyong
China Telecom



Hao Liqian
China Unicom



Dominique Leroy
Deutsche Telekom



Hatem Dowidar
e& Group



Kaan Terzioğlu
Veon



Joe Russo
Verizon



Margherita Della Valle
Vodafone

Note:

José María Álvarez-Pallete served as Chair of the GSMA Board until February 2025.

Mats Granryd served as Director General on the GSMA Board until 31 March 2025.

On 24 March 2025, Gopal Vittal became Chair of the GSMA Board, and on 3 April, Ralph Mupita became Deputy Chair.

On 1 April 2025 Vivek Badrinath became the new GSMA Director General and took his place on the Board.

Board updates 2025:

China Mobile

Gao Tongqing, Executive Vice-President, China Mobile served on the Board until September 2025.

He Biao, Executive Vice-President, was appointed to the Board as China Mobile's representative in October 2025.

China Telecom

Li Jun, Executive Vice-President of China Telecom, served on the Board until September 2025.

Huang Zhiyong, Executive Vice President of China Telecom, was appointed as China Telecom's representative in October 2025.

Telefónica

Marc Murtra, Telefónica's Chief Executive Officer, was appointed to the Board as Telefónica's representative in February 2025.

GSMA LEADERSHIP TEAM 2025

As a member of the Board, the Director General is responsible for the day-to-day management of the GSMA. The Director General is supported by a leadership team comprising individual officers, each responsible for specific aspects of the GSMA's work.



Vivek Badrinath
Director General



Lara Dewar
Chief Marketing Officer



Louise Easterbrook
Chief Financial Officer



John Giusti
Chief Regulatory Officer



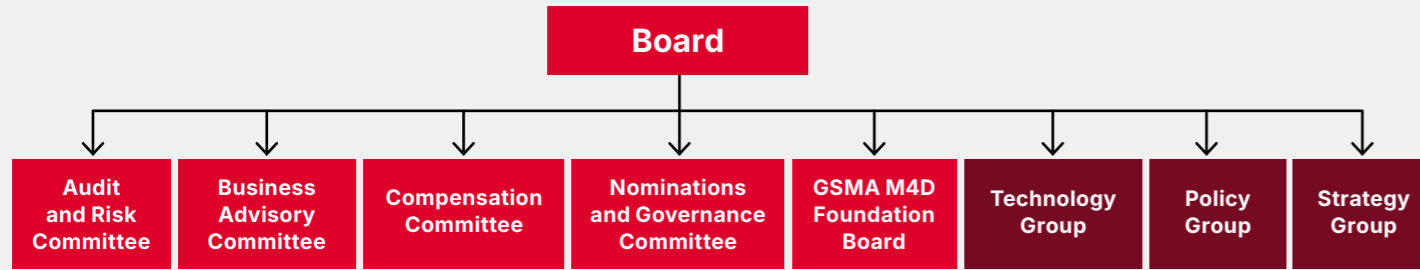
John Hoffman
CEO and Director, GSMA Ltd.



Alex Sinclair
Chief Technology Officer

Hakan Dursun joined as Chief Strategy Officer on 1 January 2026

Committees



The Board delegates specific responsibilities to the following boards and committees:

- The **Audit and Risk Committee** is responsible for overseeing the GSMA's financial controls, risk management and financial performance.
- The **Business Advisory Committee** provides advice to the Board on specific issues relating to events and other commercial activities of the GSMA to convene or support the mobile industry.
- The **Compensation Committee** is responsible for determining the compensation of the Director General and the GSMA Leadership Team and the compensation policies and practices of the GSMA, reviewing and approving the annual organisational performance objectives and reviewing Leadership Team succession planning.
- The **Nominations and Governance Committee** is responsible for managing the process of nominating, appointing and electing members to the Board, its committees and its expert groups and for overseeing and managing the governance processes of the GSMA Board, Committees and Groups.
- The **GSMA Mobile for Development Foundation Inc. Board** is responsible for oversight of the GSMA Mobile for Development Foundation donor-funded programmes. A dedicated in-house compliance team provides oversight of all grant-funded programmes to ensure that the specific contractual requirements of each donor are met.

Three groups, each chaired by a member of the Board, act as advisors to the Board:

- The **Strategy Group** supports the Board by developing and proposing strategies for overall strategic focus and direction of the GSMA, the industry, and matters of strategic importance to the operator community.
- The **Policy Group** advises the Board on specific issues relating to public policy, regulation, spectrum management, industry reputation, advocacy and the use of mobile technology to achieve scale in delivering developmental and social goals.
- The **Technology Group** provides expert advice to the Board on matters relating to products and technology architecture evolution, including interoperability.

Membership and Working Groups

As of November 2025, the GSMA had 1,176 members, comprising mobile operators and ecosystem players.

Prominent working groups and task forces	Acronym	Company members as of November 2025	Contact members, as of November 2025 (individual participants)
Wholesale Agreements and Solutions Group	WAS	723	2,460
eSIM Group	eSIM	254	733
Fraud and Security Group	FASG	433	1,293
Networks Group	NG	213	620
Interoperability Data Specifications and Settlements Group	IDS	202	305
Terminal Steering Group	TSG	210	579
Internet Group	IG	114	185
Automotive Identity Group	AID	32	48
5G Voice over WiFi Task Force	5G VoWiFi TF	28	36
5G New Calling Task Force	5GNCTF	18	34
6G Task Force	6GTF	51	88
AI Observatory Task Force	AIOBS	23	30
3GPP Operator Group	3GPPOP	57	120
Authorisation Server Authentication Capabilities	ASACG	31	45
Operator Platform Group	OPG	113	293
Post Quantum Telco Task Force	PQTN	69	146
RCS Group	RCSG	113	270

Risk Management

The Risk and Compliance Committee is responsible for the provision of effective and appropriate internal governance relating to risk management and compliance. The Committee has oversight of the organisation's risk management, internal controls and related compliance activities. Comprised of the GSMA's Leadership Team, and supported by senior advisors from the finance, people and culture, information technology and legal functions, the Risk and Compliance Committee reports on its activities to the Audit and Risk Committee.

The Risk and Compliance Committee is responsible for:

- Ensuring effective operation of the risk management framework
- Reviewing the organisation's principal risks
- Reviewing the quality, adequacy and effectiveness of the internal controls and mitigation plans
- Monitoring emerging and future principal risks
- Reviewing any material risk materialisation
- Ensuring rigorous compliance with laws and regulations relating to business conduct

In January 2025, the Risk & Compliance Committee assessed the principal risks of the GSMA as follows:

Impact \ Likelihood	Rare	Unlikely	Possible	Likely	Almost Certain
	Catastrophic				
Major			7 6	3 2 1 5 4	
Moderate			9	8	
Minor					
Insignificant					

- 1 Reliance of GSM Association on events
- 2 Cyber threat and information security
- 3 Compliance with data protection regulations
- 4 Geopolitical instability affecting GSMA operations, governance, events, and member engagement
- 5 Donor funding volatility and impact delivery risk
- 6 Compliance with antitrust law
- 7 Regulatory changes/scrutiny impacting the GSMA's operating model
- 8 Third party reliance
- 9 Safety and security at the GSMA

The Committee considered the likelihood of three risks as increasing during the year:

- Donor Funding Volatility & Impact Delivery Risk
- Third party reliance
- Regulatory changes/scrutiny impacting GSMA's operating model

Note: The risk heat map indicates the 'Net Risk' rating after taking mitigations into account. Numbers indicate risk ranking with 1 being the most impactful and 10 being the least impactful on a net basis.



Chapter 3

OUR PEOPLE: DIVERSITY, EQUITY AND INCLUSION

Our people: Diversity, Equity and Inclusion

As an organisation representing a truly global industry, the GSMA is committed to building a workforce that reflects the diversity of the communities we serve. We bring together a wide industry ecosystem and work collaboratively with members and partners to advance diversity, equity and inclusion. Through clear commitments, shared learning and strong leadership, we continue to promote best practice and drive progress both within the GSMA and across the broader mobile sector.

Diversity, Equity and Inclusion (DEI) remains a core element of the GSMA's culture. Our DEI agenda is designed to drive meaningful and sustainable progress, guided by three key principles:

- **Transparency:** We openly report our diversity data and progress, both internally and externally.
- **Inclusive Culture:** We invest in initiatives and education that promote psychological safety and support an inclusive working environment.
- **Accountability:** We work to remove bias and empower leaders across the GSMA to champion and advance the DEI agenda.

The GSMA's annual [Culture and Inclusion Report](#) is guided by these core principles to track the organisation's progress toward its Diversity, Equity, and Inclusion goals.

Our employee networks continue to play an important role in fostering inclusion across the GSMA. These communities provide supportive spaces for colleagues

to connect, share experiences, and highlight diverse perspectives, contributing to the organisation's broader diversity and inclusion strategy.

The OneGSMA Forum serves as the central, employee-led platform guiding our global Diversity, Equity and Inclusion efforts. Sponsored by the Leadership Team, it elevates diverse voices and supports initiatives that strengthen an inclusive culture across the organisation.

In 2025, the Forum further strengthened our network communities, including supporting the relaunch of the Thrive Network, formerly the Multicultural Inclusion Network. Thrive champions multicultural colleagues and allies, promoting connection, learning, and professional development. The Forum also continued to support the Parents and Carers Network, which provides a community for those with caregiving responsibilities and advocates for family friendly policies.

Together, these networks contribute to a culture where colleagues feel supported, valued, and connected.



Ensuring we deliver on our actions

The **Steering Committee** provides direction in developing the DEI strategy and promotes the DEI agenda within the organisation.



Louise Easterbrook
Chief Financial Officer

UK



John Giusti
Chief Regulatory Officer

UK



Lizzie Chilton
People and Culture Director

UK

The **DEI Team** ensures that the GSMA has appropriate tools, resources and support to develop and deliver the DEI strategy and goals to promote a diverse and inclusive working environment.



Fiona Onochie
Head of Talent and DEI

UK



Nadia Mastantuono
Culture, Inclusion and Wellbeing Partner

UK

OneGSMA Co-chairs. OneGSMA is an employee-led forum that empowers staff to actively contribute to the delivery of our DEI strategy and goals. By identifying opportunities for improvement and championing people-driven initiatives, OneGSMA plays a vital role in shaping a truly inclusive culture.



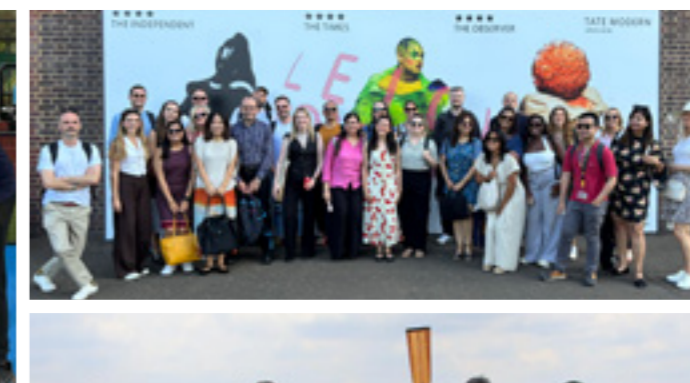
Carol Gitobu
M4D Senior Market Engagement Manager

KENYA



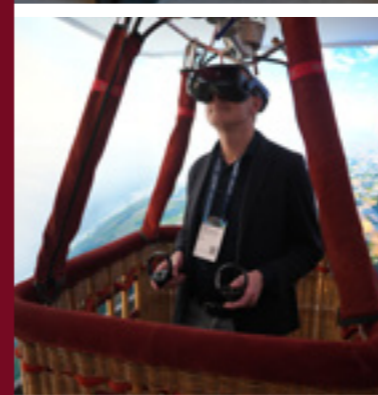
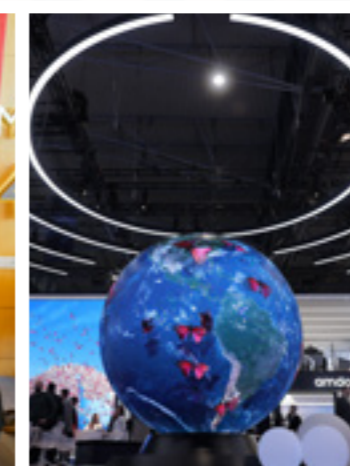
Julie Ssali
Manager, Mobile Forecasting and Modelling

UK



Chapter 4

OPERATIONAL REVIEW



GLOBAL IMPACT 2025

INVESTING FOR THE INDUSTRY

92%

of operator CEOs say the GSMA impacts the development of the mobile industry



More than

8,000

representatives from members participated in GSMA working group meetings, contributing to 180 essential documents



2 industry services launched

Disposable Number Check and Entitlements



More than

130

professionals participated in GSMA Advance training



170,000+

in person attendees at MWC and M360 events including new MWC Doha



Mobile World Live

80 hours of news to

220,000

professionals during MWC Barcelona



New data-rich GSMA Intelligence website

→ **20%+** rise in usage



182,000

global media mentions generated by media outreach at MWC Barcelona



DELIVERING IMPACT FOR MEMBERS AND THE WORLD

25

positive policy results globally



Ministerial Programme at MWC Barcelona

Delegations from 148 countries and 40 intergovernmental organisations

1,870

policymakers and regulators trained through GSMA Capacity Building courses



Open Gateway

More than 290 mobile networks are offering access to network APIs, covering 80.4% of global mobile connections

GSMA Foundry delivered more than

100 innovative projects



The GSMA Innovation Fund for Impactful AI

received 625 eligible applications from 40 countries



24

mobile operators have adopted the GSMA's Responsible AI Maturity Roadmap



The United Against Scams initiative:

70% of agreed baseline safeguards in place or committed



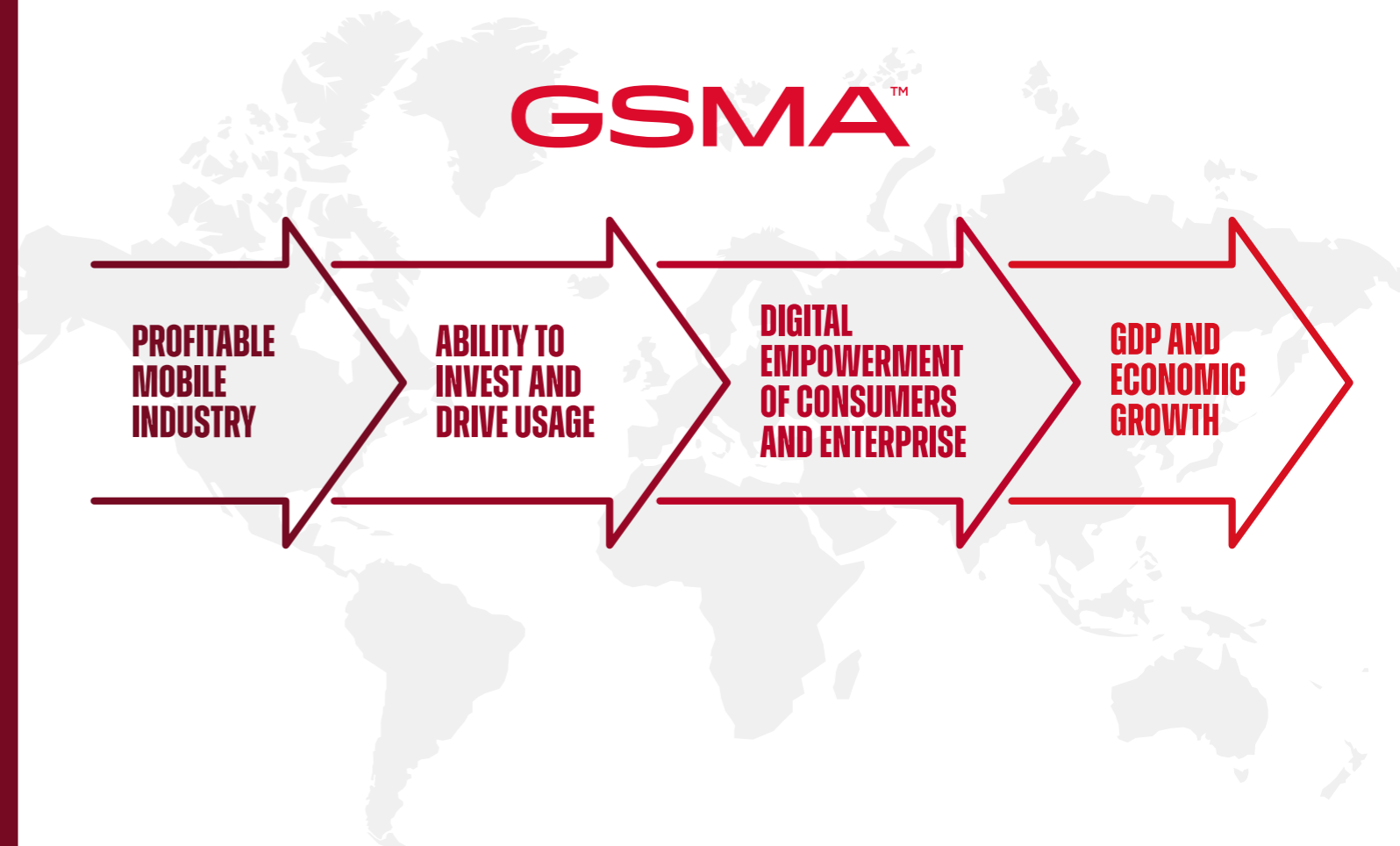
Chapter 4.1

DELIVERING POSITIVE IMPACT

The GSMA's vision is to unlock the full power of connectivity so that people, industry and society thrive. Investment and innovation by the mobile industry are crucial to develop affordable, accessible and sustainable solutions to the world's most pressing societal, economic and environmental challenges.

In 2025, and for the second consecutive year, the GSMA was able to invest significantly in the organisation and its core assets and activities. This targeted investment, along with a robust and flexible organisational structure and strong financial resilience, allows the GSMA to continue to discover, develop and deliver innovation that is foundational to positive business environments for members and advancing society more widely. This is GSMA impact.

This operational review demonstrates the impact achieved across every area of the GSMA's global footprint.



Chapter 4.2

2025 REALITY EMERGING TECH AND RISING GEOPOLITICAL TENSIONS

Geopolitical tensions intensified in 2025, which made doing business more complex. 2025 will be known for its macroeconomic uncertainties and the widespread arrival of artificial intelligence - potentially the most transformative technology since the advent of the internet.

Wars in Ukraine, the Middle East and Africa continued, causing further human upheaval and strain to supply chains. Add to that a global trade war and the introduction of tariffs by the US, and the private sector needed as much adaptability and resourcefulness as it could muster. Against this backdrop, policy fundamentals were never more important.

When it seemed the global system was being upended, confidence in the short- and medium-term was naturally fragile. Yet, despite the uncertainty, global growth held steady, and stock markets proved largely resilient, buoyed in part by the AI boom. Whether the scale of this surge in capital is fully justified or partly excessive, its impact on business practices and daily life will be profound.

In the face of the challenges experienced in 2025, and the need to maintain economic progress amid geopolitical upheaval, mobile connectivity and services continue to play a foundational role in enabling governments, industries, communities, people and devices to access real-time information and advice.

Chapter 4.3

INVESTING FOR THE INDUSTRY

The GSMA invests to create a firm foundation which serves and supports the mobile industry and ecosystem. This foundation includes:

- a large and vibrant member base engaged across multiple touchpoints,
- technology working groups that bring together the best expertise to drive the industry forward,
- and an events platform that invites the world in.

The GSMA leverages all of its assets to build and deliver impact for the industry.

Advancing members' goals

Representing the global mobile industry, the GSMA is a vibrant community of industry leaders, experts, and visionaries who are shaping the future of mobile technology and its transformative impact on societies worldwide. As of November 2025, the GSMA had 1,176 members, comprising mobile operators and ecosystem players.

GSMA CEO member survey

In the GSMA's annual survey of operator member CEOs, 92% of respondents acknowledged that the GSMA plays an impactful role in the development and representation of the global mobile communications industry. While the member survey again resulted in a high net promoter score, the GSMA is taking a focused and proactive approach

to addressing minor variations within the overall score by enhancing engagement, refining the end-to-end experience, and strengthening feedback mechanisms. The GSMA is committed to delivering clearer value, more consistent communication, and continuous improvements that directly respond to member needs.

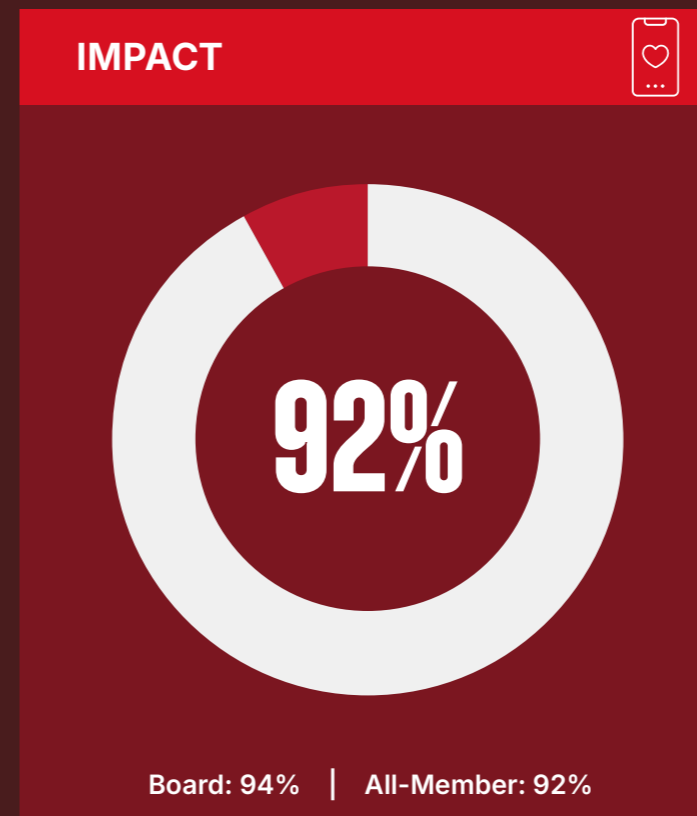
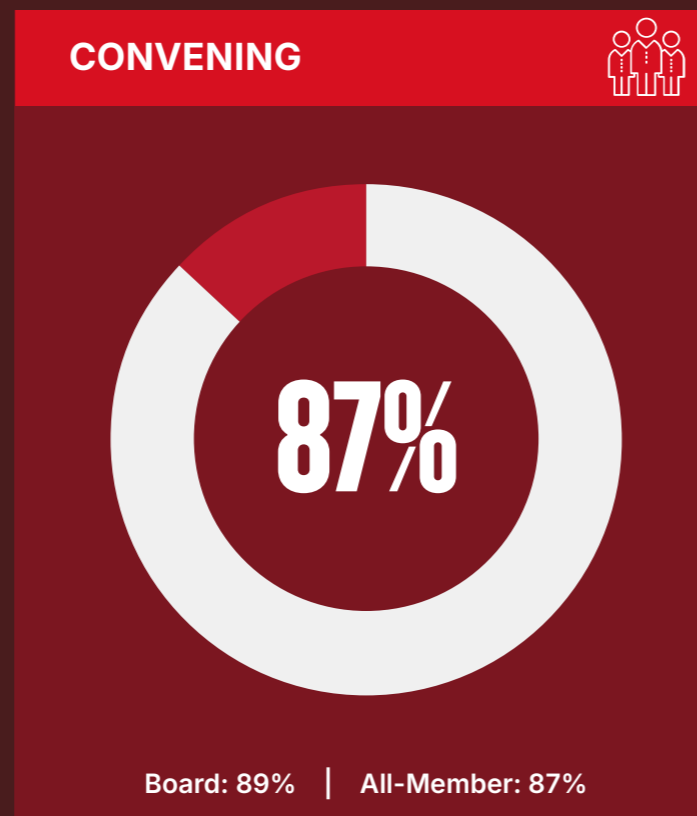
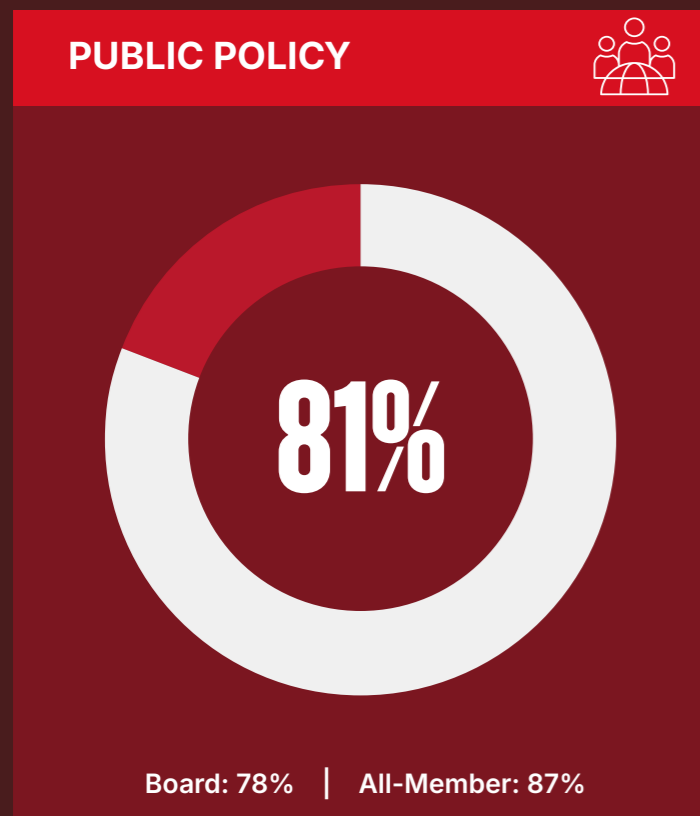
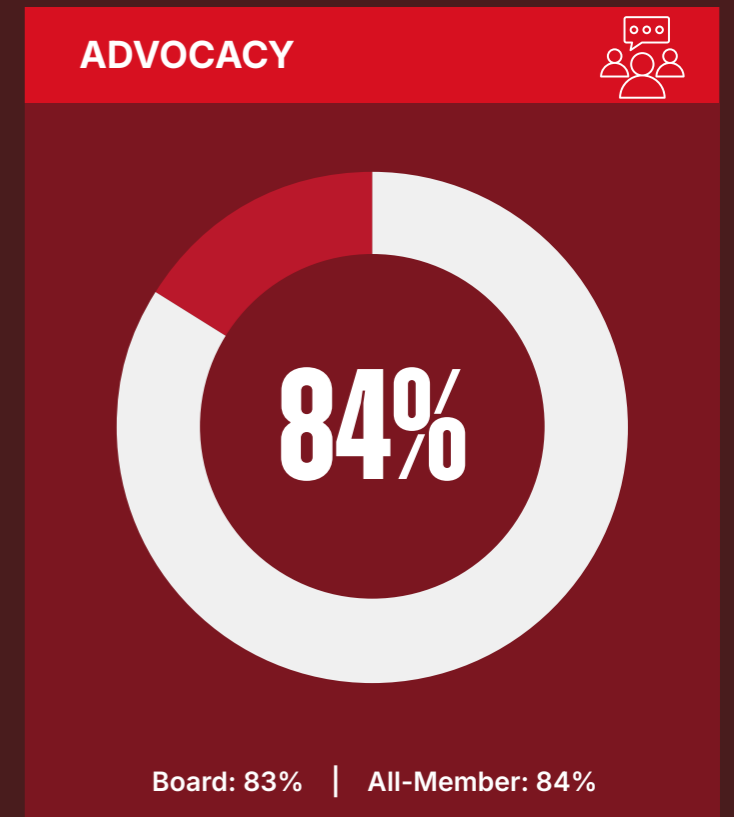
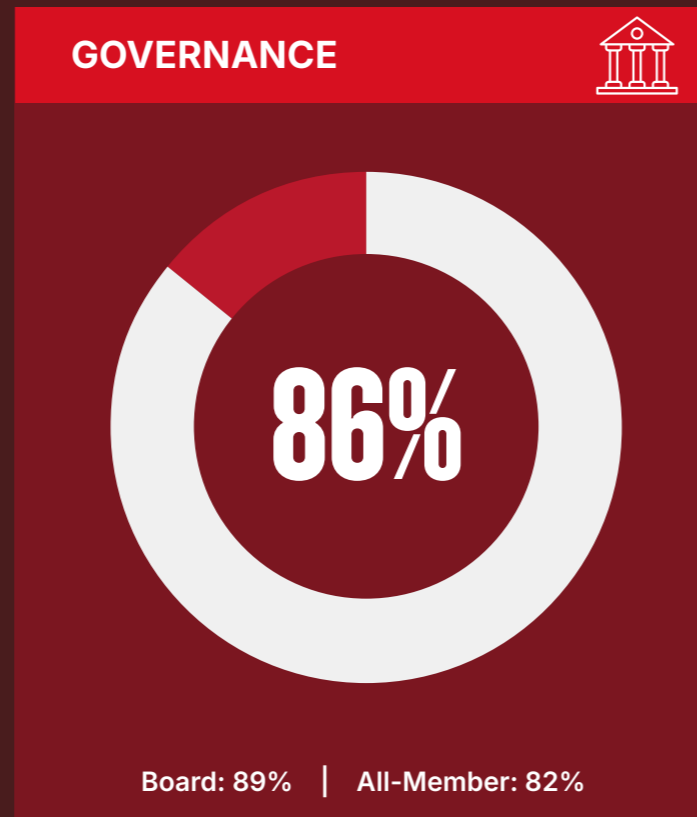


GSMA OPERATOR CEOS SURVEY RESULTS 2025

Net Promoter Score

40

(Board: 45)
(All-Member: 57)



Technology working groups

The GSMA's global technology working groups, comprising over 187 groups and sub-groups, held more than 770 meetings with over 8,000 member participants. These groups updated or released approximately 180 essential documents, covering all aspects of system specifications, including interoperability, roaming and interconnect.

As the environment changes and technology develops, the GSMA, in collaboration with the Board, identifies new areas that could benefit from an industry wide approach.

In 2025, at the request of the Board, the GSMA formed the **AI Observatory** to investigate how AI applications are changing traffic characteristics on mobile networks. With more than 20 company members, the AI Observatory sources reliable data that enables the optimisation of network operations for both performance and sustainability purposes. The AI Observatory is initially focused on analysis of this traffic data, such as identifying applications that make heavy use of generative AI.

The GSMA also created a **6G Task Force** to explore technology for 6G. With more than 50 company members, the task force aims to ensure that priority topics are considered for global standardisation, aligned with market and societal needs, and supported by recognised best practices. Through open collaboration, knowledge sharing, and alignment across the ecosystem, the task force is helping guide the industry towards a coherent, forward-looking approach to harnessing AI-native networks and intelligent automation, interoperability, APIs, and open interfaces, radio technology and spectrum strategy.

Another high priority for the working groups was updating the TS.43 specification to allow eSIM transfers across multiple platforms. The protocol describes the procedure for configuration of a device-based service performed during the entitlement verification step of the service or during the activation of that service. At the same time, the **Terminal Steering Group** facilitated subscription transfers between source and target devices using a temporary token when one of the devices does not support the TS.43 protocol. The group added a new feature to enable satellite services during disaster situations for those users who are normally not entitled to satellite service.

The **5G Voice-over-WiFi (5G VoWiFi) Task Force**, which was initiated by the Board, released the *Enriched service over converged Wi-Fi and cellular*

network white paper. It explains why Wi-Fi calling is needed for use cases on the ground, at sea, and in the air. It also outlines the network architecture for Wi-Fi Calling via a 5G core network, as well as the characteristics of Wi-Fi Calling networks and technologies, business models and trials performed by China Telecom. The paper includes contributions from the Wireless Broadband Alliance and Wireless Broadband Association.

In May, the **Wholesale Agreements and Solutions Group (WAS)** agreed a template (AA.105 v1.0) to support in-flight connectivity that is accessible to all passengers. The template, which helps roaming partners to connect their subscribers to the growing number of connected commercial aircraft, was further updated in September.

The **5G New Calling Task Force**, which was created in 2024 to provide strategic guidance, address challenges and support the adoption of 5G New Calling (5GNC), now has 34 members from 18 countries. Chaired by China Mobile, in 2025 the Task Force proposed an SDK development as an open-source project, while developing a white paper analysing the business cases for 5GNC, how to utilise the advantages of 5G technology, solve industry pain points, and bring users a richer and more convenient service experience.

The **Rich Communication Service (RCS) Group** released RCS version 3, which specifies how to apply Messaging Layer Security (MLS) so that RCS officially supports end-to-end encryption across multiple platforms. This security enhancement will help protect users against fraud, scams and other security threats. Both Google and Apple integrated support for RCS messaging into their smartphone operating systems, while the GSMA **Network Group** released a new IMS Data Channel profile in NG.134.

The completion of IoT **eSIM standardisation** in the first quarter of 2025 triggered a wave of innovation and adoption across global markets. In just nine months, the GSMA certified eight IoT eUICC products and five eUICC IoT Remote Manager (eIM) servers - clear evidence of accelerating industry uptake. Notably, two of these five eIMs belong to Chinese companies, underscoring their deepening commitment to secure and scalable IoT deployments.

Chinese industry players significantly increased their engagement with the GSMA's certification ecosystem. The number of organisations achieving SAS certifications, both SAS-UP and SAS-SM,

surged, reflecting their readiness to meet global security benchmarks. In parallel, eSA certifications gained strong traction among Chinese manufacturers. Of the 11 companies certified or in the process of certification under the eSA scheme, six are based in China, positioning them to lead in trusted remote SIM provisioning and large-scale eSIM consumer and IoT enablement.

Moreover, Chinese stakeholders increased their submissions to the GSMA eSIM Compliance Process across both eSIM consumer and eSIM IoT domains. Their deep engagement with GSMA certifications, spanning SAS, eSA, and Compliance Confirmations, demonstrates a clear commitment to global standards, technical excellence and scalable innovation.

To publicise the working groups' output to a wide audience, the GSMA established a regular LinkedIn Live series where experts discuss recent topics and developments in the working groups. Each session is accompanied by a blog, giving context and next steps. And a new quarterly technical blog breaks down the latest GSMA technical documents, extracting what matters most and explaining how this work supports innovation, interoperability and industry-wide progress.

The GSMA also launched the Working Group Recognition Awards, to celebrate outstanding contributions from members across the technical and policy working groups. The awards recognise individuals and organisations that go above and beyond to drive collaboration, innovation and meaningful progress across GSMA initiatives.

Value-added member services

The GSMA's collaborative membership platform Member Gateway was upgraded with improvements to usability, personalisation and efficiency. A redesigned search experience and streamlined directory make it easier for members to quickly find relevant content, organisations and contacts. Users now have more control over profiles and account settings, while personalised calendar views ensure members can easily track events and engagements that matter to them. Additionally, new profile pages offer a more intuitive layout and clearer display of member information, improving discoverability and connections across the ecosystem.

There is also growing support for MVNOs, with a dedicated programme, beginning with the MVNO Summit at MWC25 Barcelona, and tailored updates, tools and events, a new newsletter and regular online sessions.

The new Monthly New Member Blog introduces recently-joined organisations to the rest of the GSMA community, as they share who they are and why they joined.

Enhanced visibility at GSMA Pavilions

Across MWC Barcelona, Doha, Kigali and Shanghai, GSMA Pavilions offered members opportunities to jointly showcase their innovations and demonstrate solutions directly to industry decision-makers. Premium visibility in high-traffic areas enabled members to elevate their brands, generate leads and accelerate commercial conversations.

"The most important for us is that the GSMA has initiated this group of NTN – non terrestrial networks – that is the one that will drive the standardisation towards the satellite industry... having the direct connection with the MNOs helps us a lot. The way forward to signing roaming agreements with them is thanks to the GSMA standardisation framework."

Jaume Sanpera, CEO, Sateliot.

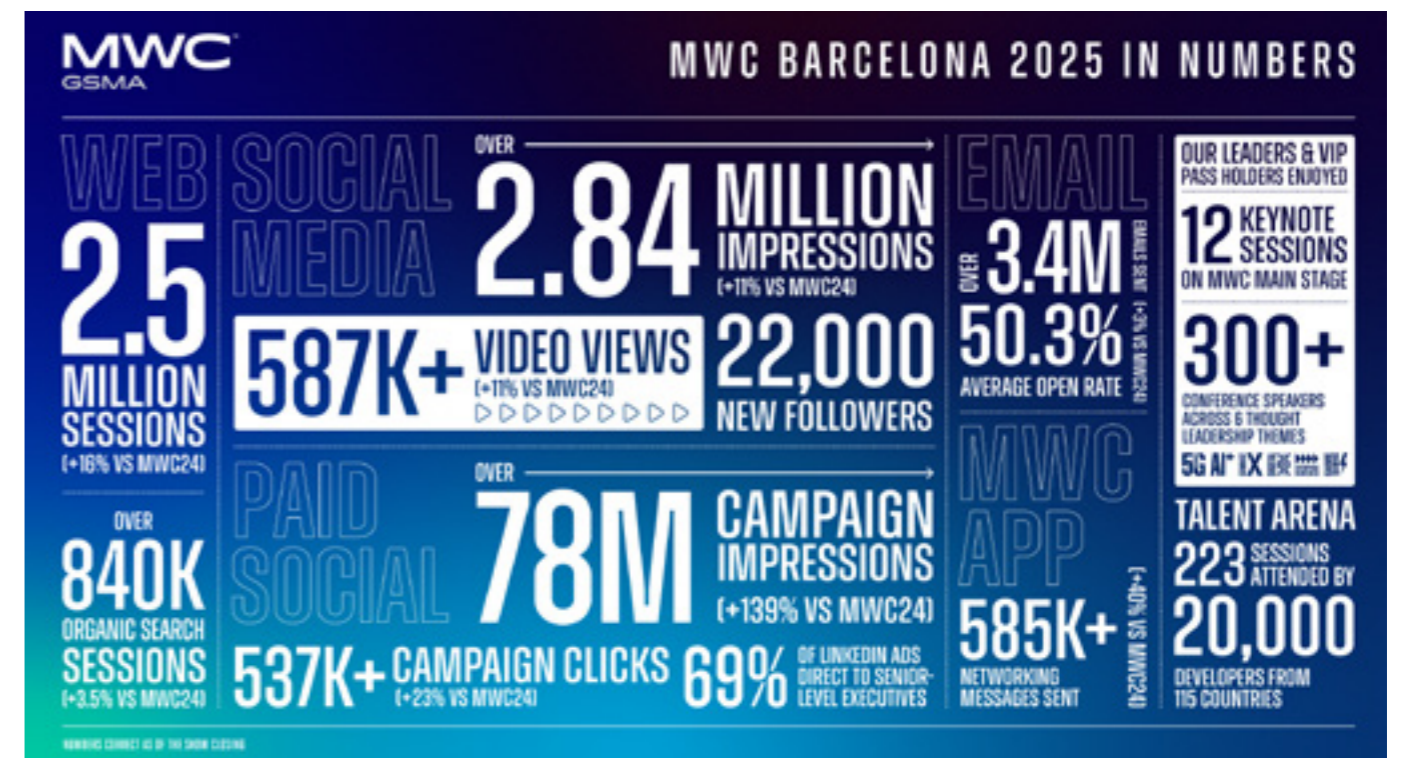
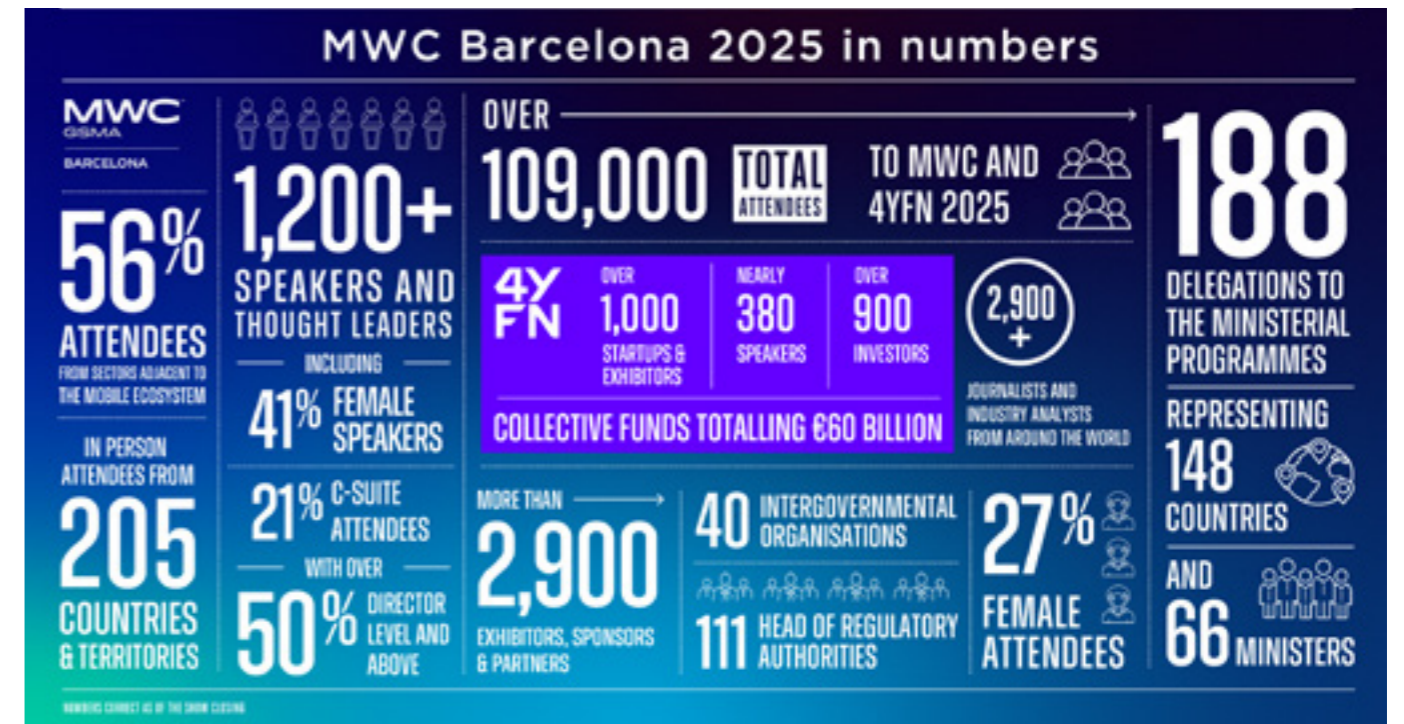
Convening our global community

GSMA events bring together key players from the mobile industry, the public sector, and partners from across other industries and regions, to progress the mobile ecosystem and all of society.

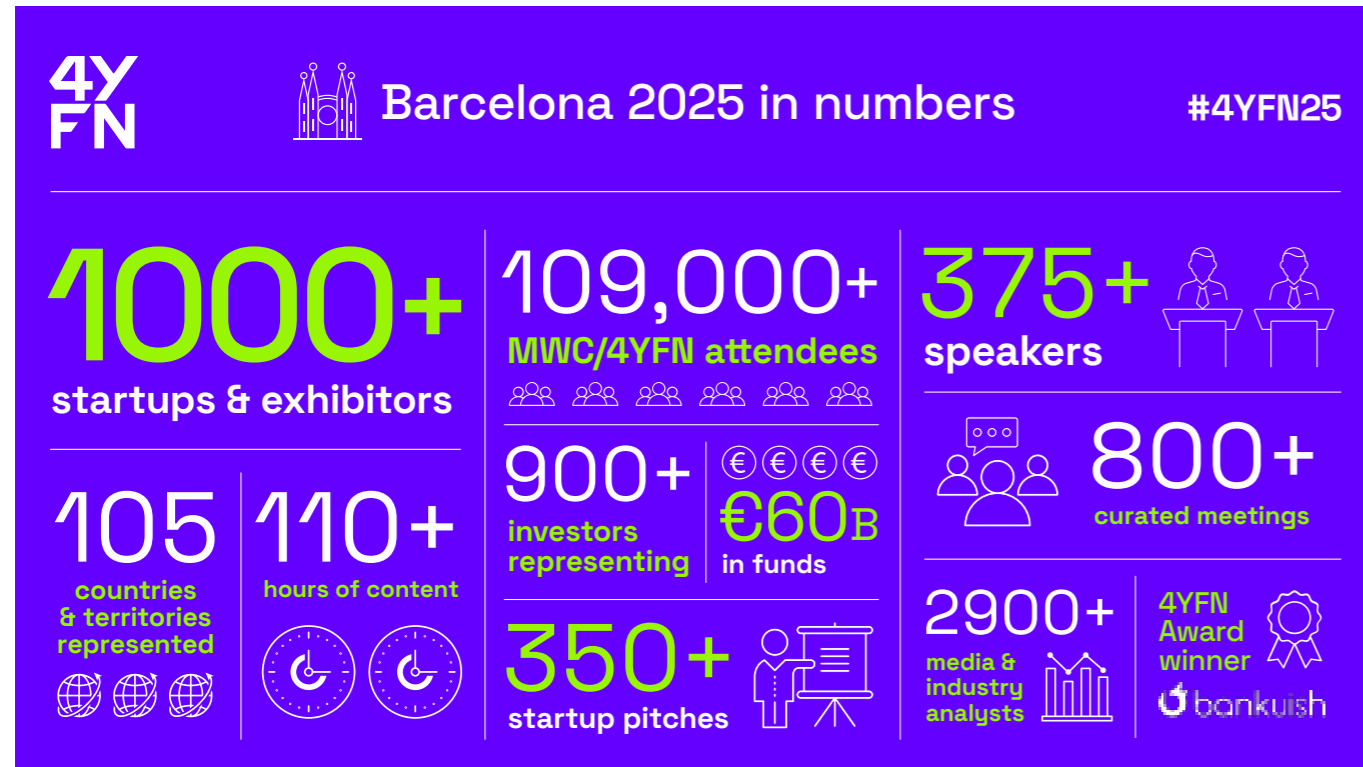
MWC25 Barcelona once again reaffirmed its position as the world's largest and most influential connectivity event. With a record-breaking 109,000 attendees from 205 countries and territories, MWC25 Barcelona showcased the power of advanced mobile technology and AI to shape industries, economies and society as a whole. More than 2,900 exhibitors, sponsors and partners presented groundbreaking innovations, while over 1,200 speakers and thought leaders discussed how technology is redefining business, policy and culture.

With 56% of attendees from industries beyond the core mobile ecosystem, MWC25 Barcelona reflected the expanding influence of connectivity across every sector.

MWC25



Co-located with MWC25 Barcelona, 4YFN showcased breakthrough innovation, bringing together over 1,000 startups and exhibitors, 375 speakers, and 900 investors representing €60 billion in funds.



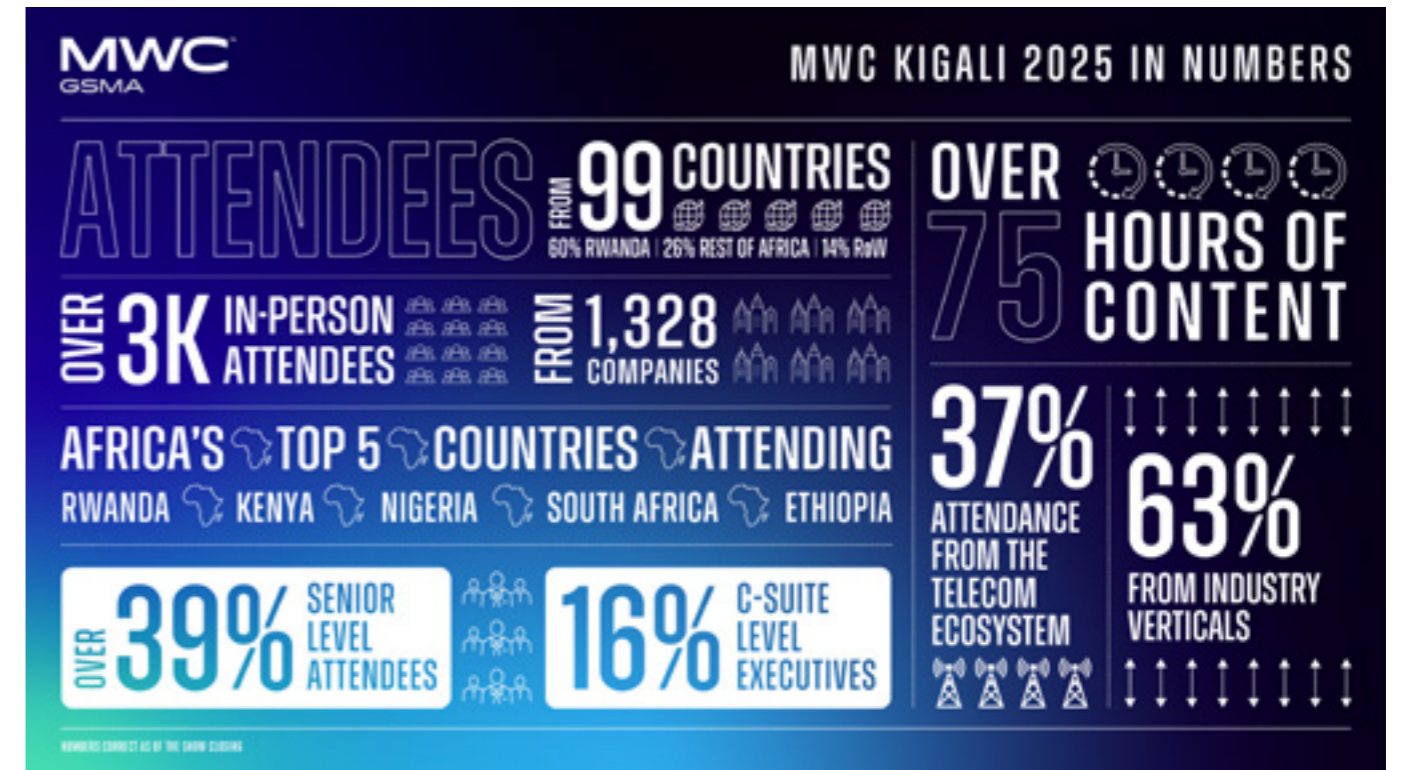
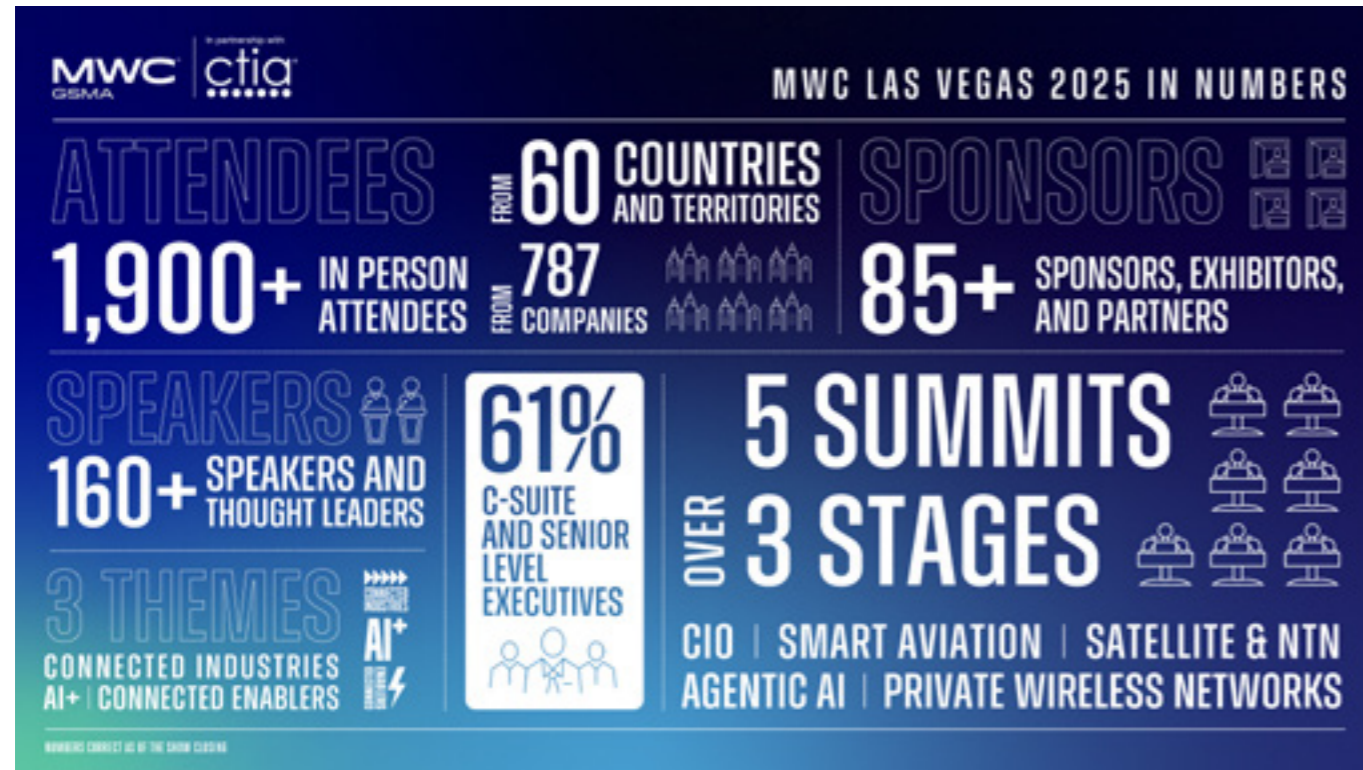
4YFN Highlights

In June, MWC25 Shanghai convened global innovators, policymakers and business leaders from across Asia Pacific to explore how 5G, AI and IoT are driving intelligent connectivity, and featured new showcases, such as the Innovation Frontier Zone, IOTE Expo, and the Asia Mobile Awards.



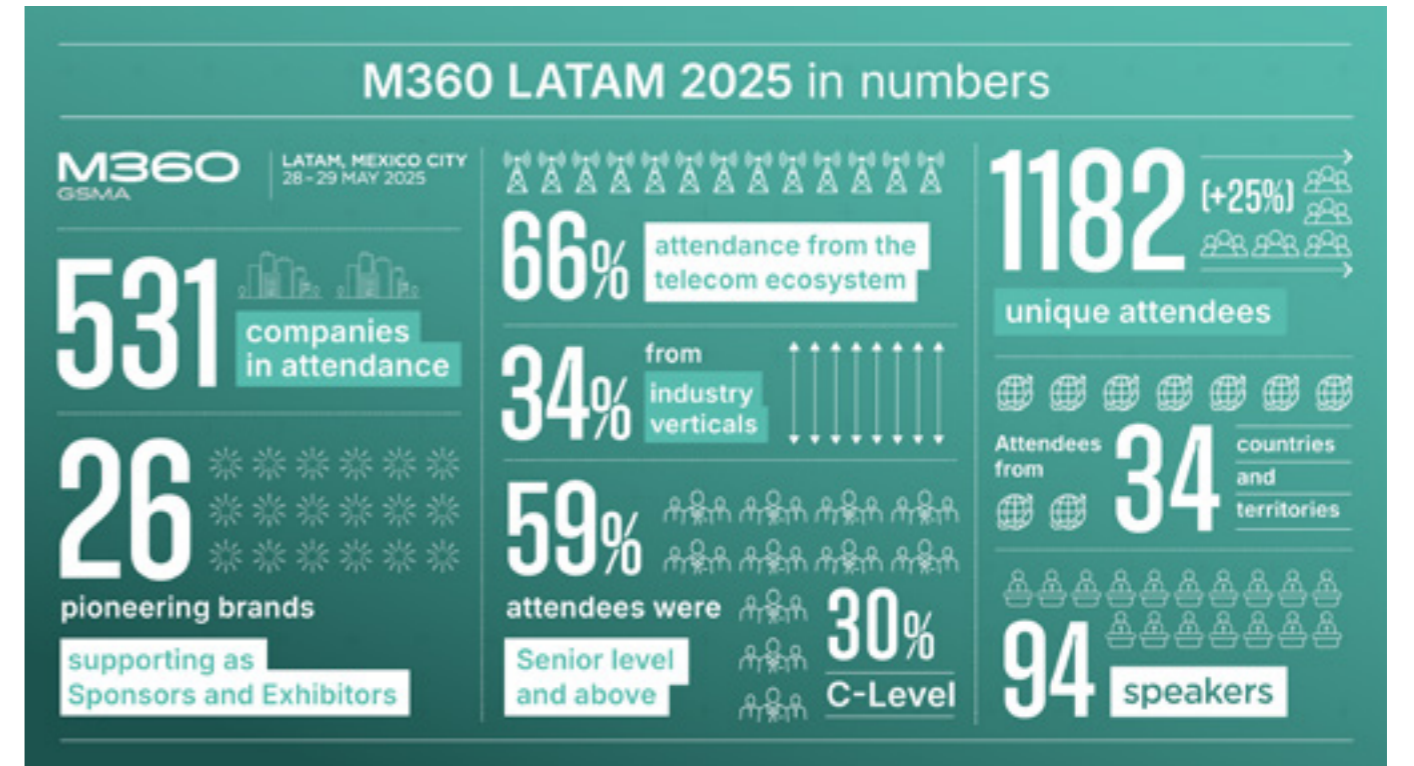
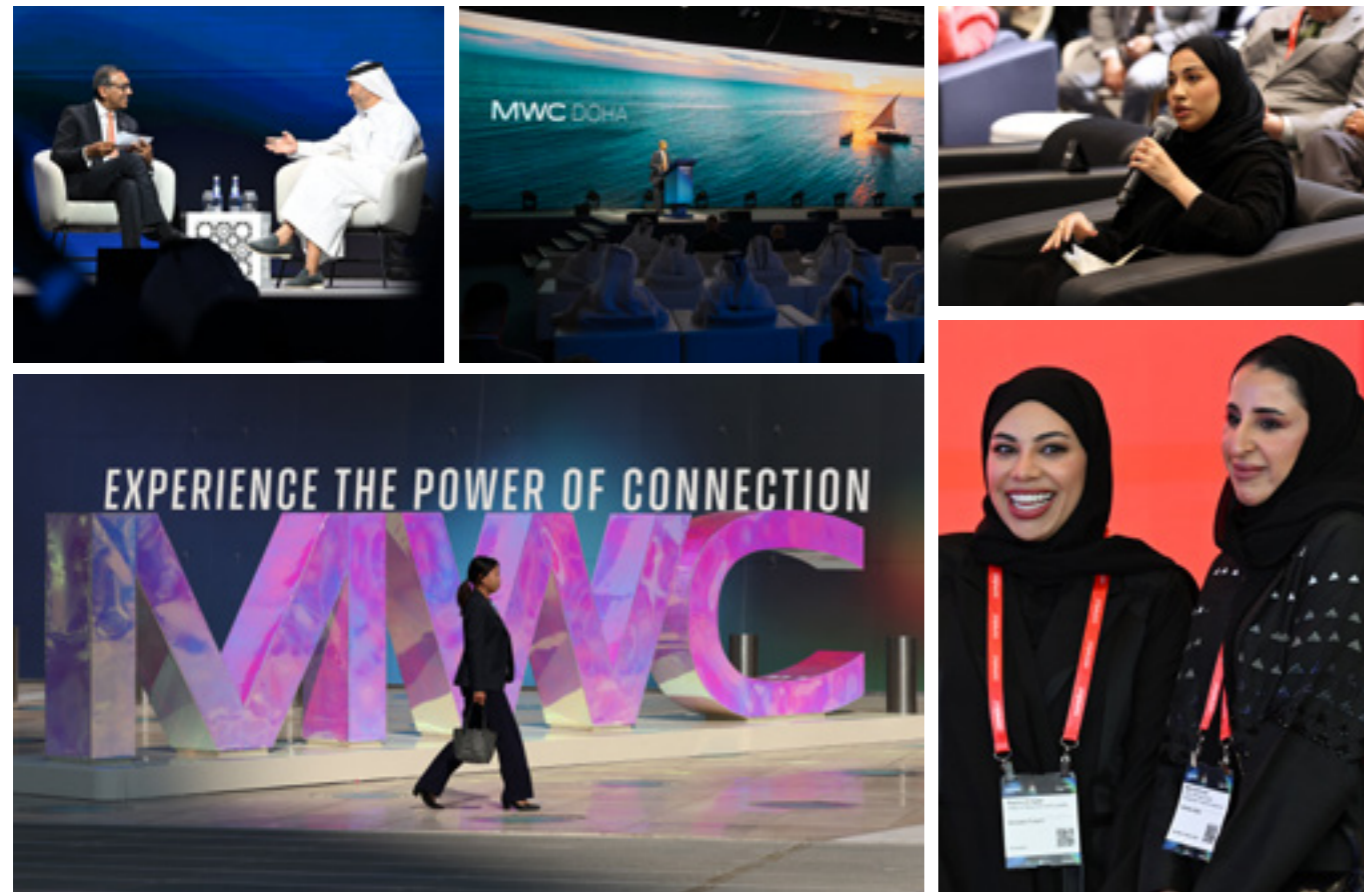
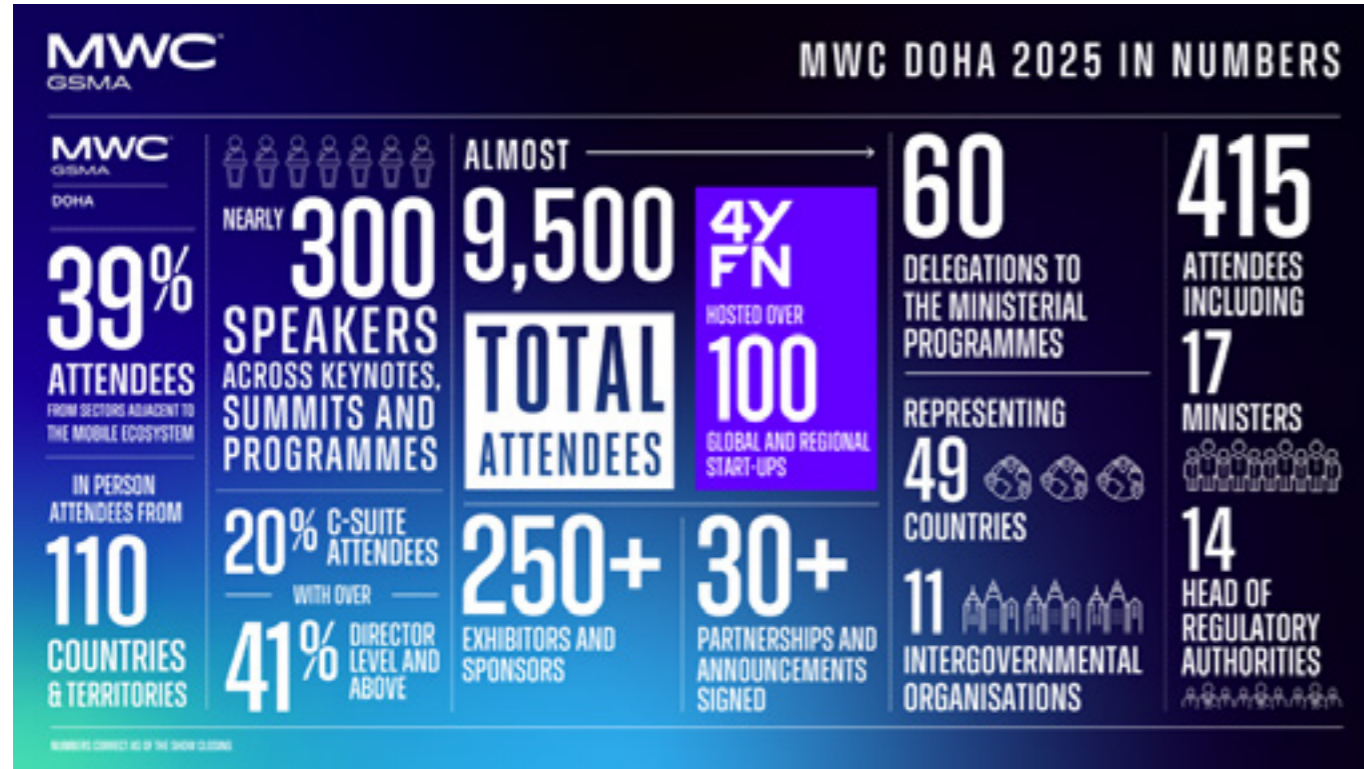
MWC25 Las Vegas, in partnership with CTIA, marked a new chapter in its evolution with a successful debut at Fontainebleau Las Vegas. The event brought together 1,900+ attendees from 60 countries and over 85 sponsors and partners, reinforcing its focus on enterprise connectivity and CIO-led innovation.

In October, MWC25 Kigali brought together leaders from across Africa and beyond for three days of collaboration focused on accelerating the region's digital transformation. The event welcomed over 3,000 attendees from 99 countries and nearly 80 exhibitors, sponsors and partners, supported by more than 230 speakers across keynotes, summits and expert-led sessions. With the GSMA Ministerial Programme joining Kigali for the first time – convening 49 delegations from 33 countries – the event strengthened its role as a pan-African platform for advancing digital inclusion, innovation and policy progress.



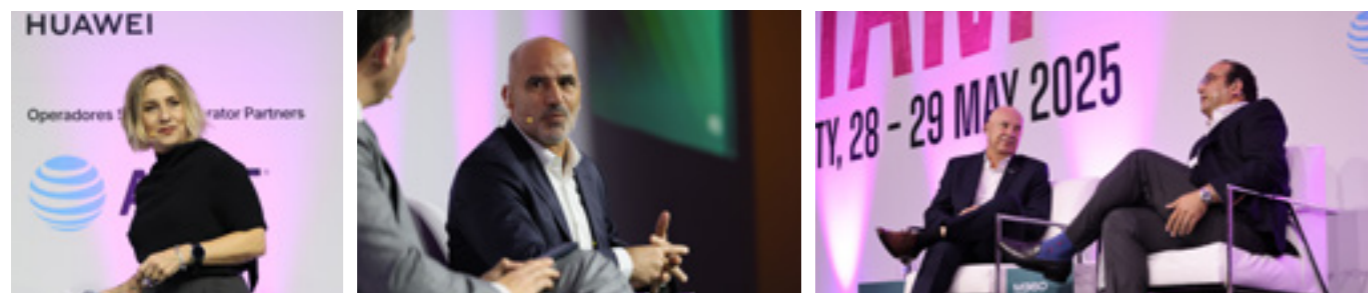
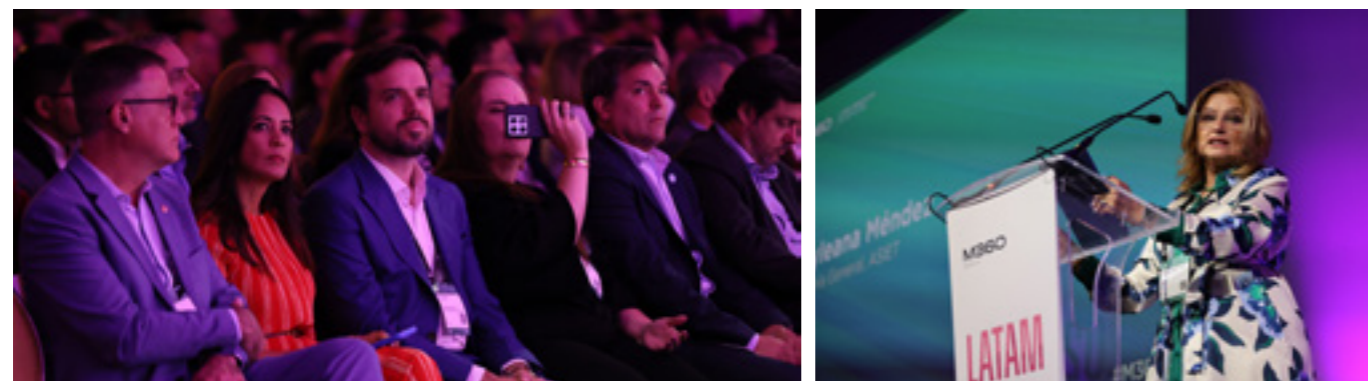
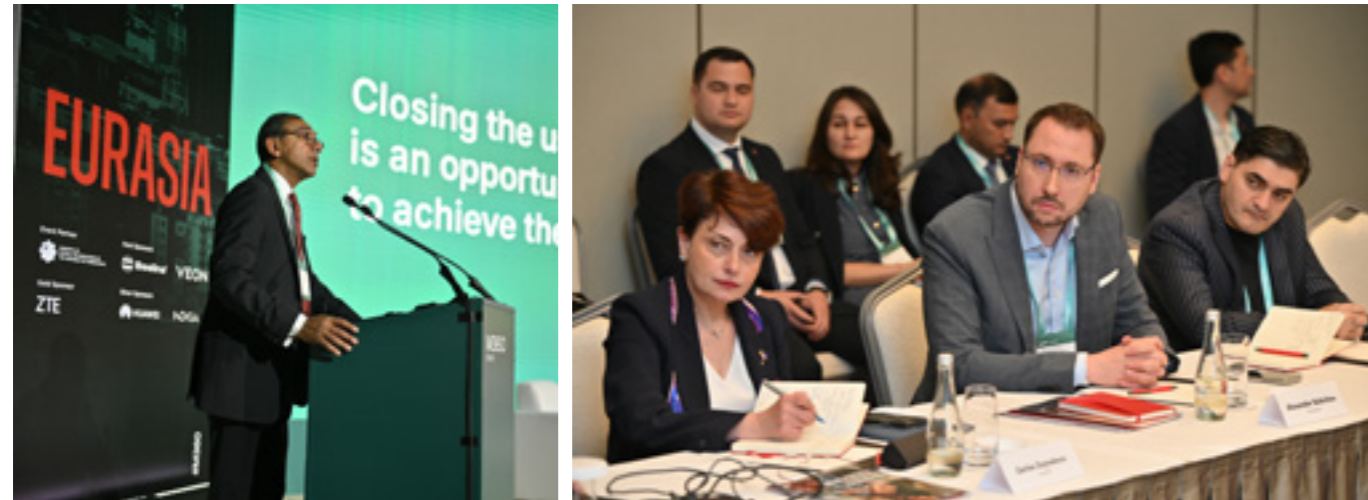
In November, the inaugural MWC25 Doha supported Qatar's vision to become a regional hub for digital innovation, convening global leaders to accelerate digital transformation, display advancements in AI, 5G and smart mobility, all helping to shape the region's connected future.

The regional M360 Series reinforced its global reach with events in Eurasia and LATAM in May, convening industry leaders, policymakers, and innovators to accelerate digital transformation through 5G, AI, and sustainable connectivity, while showcasing how regional collaboration is driving inclusive growth across emerging markets.



In 2025, country-level events continued to expand, bringing together government leaders, regulators, and industry, to discuss how the mobile industry plays a pivotal role in building trusted, inclusive and future-ready digital nations. All events were accompanied by targeted media activity.

In Asia Pacific, for example, the GSMA hosted Digital Nation Summits in Hanoi, Singapore, Islamabad, Kuala Lumpur, Manila and Jakarta, while in Africa, the GSMA held Digital Summits in Ghana, the DRC, South Africa and Senegal.



Industry services

GSMA Industry Services address challenges facing businesses and organisations in the telecom industry, connected industries and the public sector. While many issues are identified by the GSMA's working groups, businesses are increasingly approaching GSMA Industry Services directly to highlight problems and solutions.

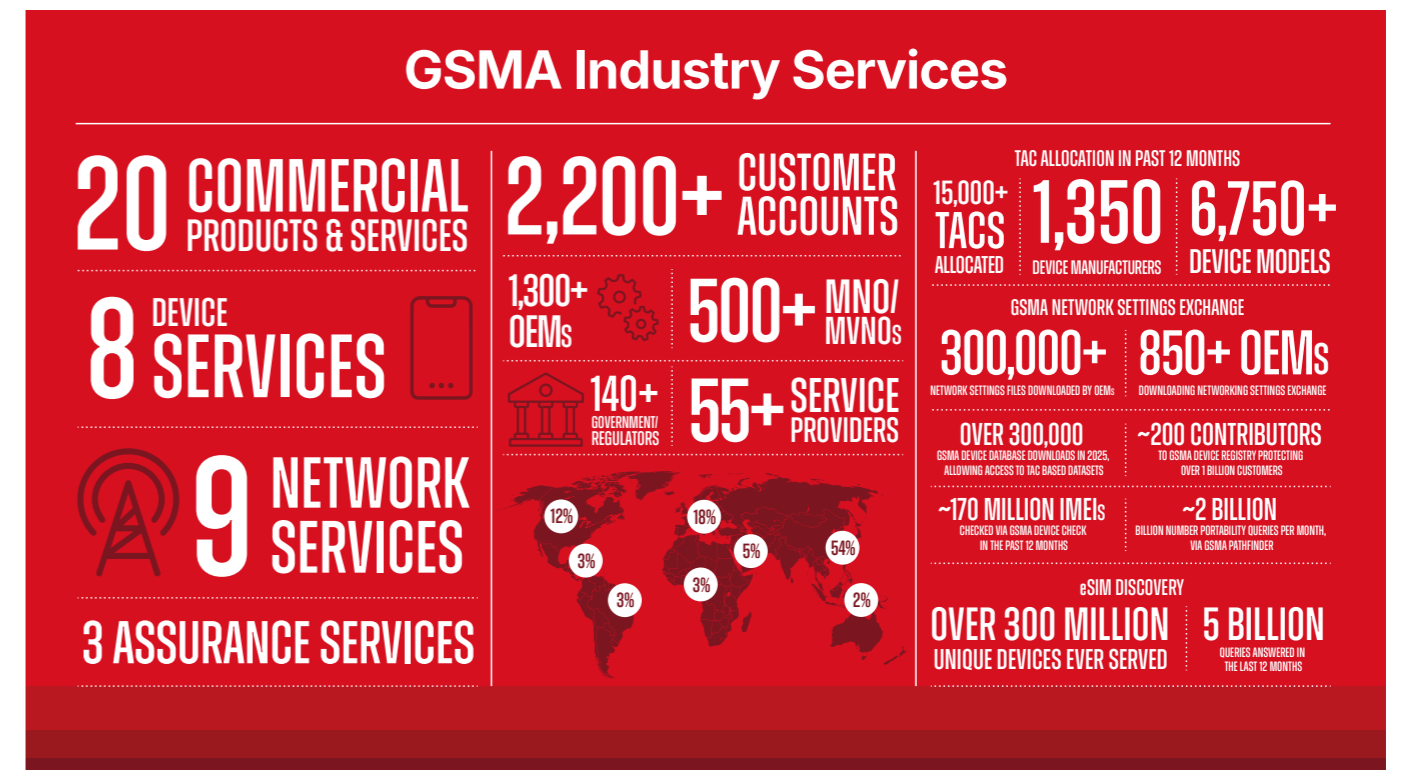
Serving over 2,000 customers in more than 150 countries, the current portfolio comprises 20 different services across devices, networks and assurance.

GSMA device services are based on the accurate, reliable and comprehensive mobile device data collated by the GSMA – they include the TAC allocation service for all connected industries. These services provide essential insights to improve business performance and customer experience, as well as to protect the wider ecosystem from device fraud and crime.

GSMA network services provide solutions to a range of issues, from reliable roaming and 4G/5G services, to sunsetting older networks, providing secure VoLTE and preventing fraud and scams across SMS and calls. Ultimately, these services facilitate the innovation, enhancement and interoperability of mobile networks.

GSMA assurance services are security assurance schemes, agreed by the industry via the GSMA's working groups, which ensure mobile security products and their suppliers comply with rigorous industry standards – bringing more resilience to networks and devices.

The new GSMA Services Partnership programme encourages existing businesses to partner with GSMA Industry Services and benefit from experience, knowledge and contacts. It is open to all businesses within the connectivity ecosystem and related industries.



Two new services were launched in 2025:

- **GSMA Disposable Number Check** prevents digital fraud before it happens, by stopping compromised disposable numbers from reaching a platform or network.
- **GSMA Entitlements** makes it easier for small and medium-sized networks to manage service entitlements for both iOS and Android users, which is crucial with the transition to embedded SIMs (eSIMs).

Training the industry

Launched in 2024, GSMA Advance has evolved into the GSMA's global hub for professional learning and accreditations, supporting workforce development across the mobile and digital ecosystem.

In 2025, GSMA Advance significantly expanded its programme portfolio and global reach. New accreditations – *Next Generation Connectivity and Sustainable Governance in Telecoms* – joined the existing *Best Practice in Public Policy and Regulatory Impact and Mastering Mobile & Telecoms* programmes, deepening industry capability in areas critical to innovation and growth. The launch of eSIM Unlocked, a specialist course exploring interoperability, adoption and market opportunities, further strengthened the portfolio in the emerging technology domains.

In 2025 GSMA Advance worked with an expanded network of tier one operators and ecosystem organisations to deliver bespoke enterprise learning solutions, tailored workshops, and in-person training across multiple regions. In 2025, more than 130 professionals from organisations around the world took part in GSMA Advance programmes, up from 55 in 2024.

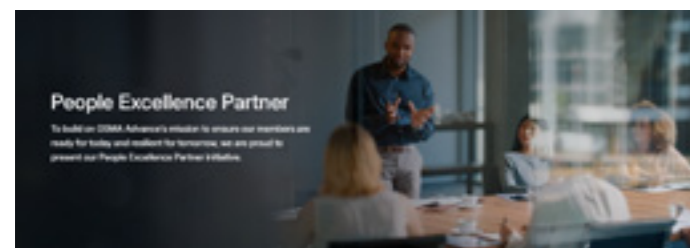
The GSMA also launched the *People Excellence Partner initiative* – a recognition programme celebrating organisations that demonstrate sustained commitment to the development and upskilling of their workforce, and the first two partners were brought onboard. This initiative reinforces the GSMA's mission to close skills gaps, foster resilience, and build a future-ready talent pipeline for the mobile industry.

In 2025, the GSMA created Executive Experiences – enabling senior leaders to step beyond the everyday and embark on an expertly curated week in the markets that are defining the next era of mobile innovation.

During the first Executive Experiences trip, leaders from Airtel Money, Axian Open Innovation and Fintech, M-Pesa Africa, M-Pesa Ethiopia, MTN MoMo, Orange Money and Vodacom M-Pesa were exposed to the mobile money ecosystem in the Philippines, including meetings with 917Ventures, the Bangko Sentral ng Pilipinas, CARD Pioneer, GCash, GoTyme, Mastercard, Maya and Uno Bank, as well as immersive activities with GCash and GoTyme.

"This visit was a glimpse of where African telco-led mobile money businesses could be in the next 5-10 years. We got a unique opportunity to observe a fully-fledged acquirer play, gamified and UX-optimised savings and lending products, and a digital banking set up. I left the Philippines with new ideas."

Elsa Muzzolini,
CEO – Safaricom M-Pesa Ethiopia



Amplifying thought leadership

GSMA Intelligence

In 2025, GSMA Intelligence continued to support the GSMA's strategic priorities with world-leading data and insights, delivering both ecosystem impact and revenue diversification. Beyond maintaining the industry's most comprehensive mobile market datasets – covering more than 1,000 operators, 4,500 networks, spectrum allocations across all markets, and more than 50 million data points – the business evolved in important ways. A major milestone was the launch of the new GSMA Intelligence website, a redesigned, data-rich platform introducing advanced features and seamless access to insights, driving a 20% plus rise in usage across GSMA teams, members and subscribers.

GSMA Intelligence data and analytics, and laying the groundwork for a 2026 relaunch with major improvements in accuracy, completeness and usability.

The GSMA Intelligence research and benchmarking portfolio expanded with new initiatives, including the AI Observatory and Green Network Index – defining industry standards for innovation and sustainability. The new Industry Checkpoint series and expanded Enterprise Survey – to 32 countries and 5,000+ companies – further deepened understanding of the market forces shaping telecoms.

Together, these developments reinforced GSMA Intelligence's position as the industry's definitive source of data-driven insight.

The GSMA's coverage maps service was brought fully in-house, strengthening integration with

<p>1000+ mobile operators</p>		<p>4500+ mobile networks</p>
	<p>50M+ data points</p>	
<p>Historical data from 2000</p>		<p>REAL-TIME industry updates</p>
	<p>Future forecasts through to 2030</p>	

Mobile World Live

Mobile World Live (MWL), the media arm of the GSMA, serves a daily global audience of 188,000 professionals through its flagship daily newsletter. Building on this base, in 2025 MWL expanded its reach with two new specialist newsletters: *Digital Industries*, targeting enterprise and industry, and the *Early Edition*, offering a concise one-minute news summary by midday (US) / morning (Europe).

The *Unwrapped* online event series returned for 2025, with a new two-day *Digital Industries* event, covering digital transformation and AI for industry. The *5G Evolution* event returned for its fourth year, covering six critical topics and featuring 24 CxO-level keynote speakers from across the industry and globe.

At the request of partners, MWL's in-house editorial and production teams produced bespoke content across a diverse mix of media including video, whitepapers, webinars, case studies and influential survey reports. They also produced industry-leading Topic Panel discussions to engage experts and decision makers, and deep-dive podcast episodes, exploring the hottest topics shaping the industry.

At MWC25 Barcelona, MWL broadcast over 80 hours of exclusive content, featuring 184 industry experts, with news reaching 223,306 professionals across the globe, including the 109,000 MWC attendees.

Mobile World Live has over 2.1 million unique visitors each year

This makes it the leading source of news, insights and trends for the global mobile industry.

Web global reach

Europe	43%
Asia	22%
Americas	27%
Africa	6%
ROW	2%

Email global reach

Europe	34%
Asia	36%
Americas	16%
Africa	4%
ROW	10%

2.1M
Total visitors to MobileWorldLive.com

5.5M
Total page views

188,000
Subscribers to the Daily newsletter

91,361
Social media followers

140,049
Subscribers have attended an MWC event

76,308
Leads generated

51% Business decision makers, made up of C-level, VP's and senior management

Mobile World Live: MWC25 in numbers

80 hours of broadcast

21 cameras

59 production crew

184 expert industry speakers

41,073 INSIGHT copies read

223,306 daily news readers

41,861 webpage views

18,700 livestream views

49 video interviews

Media engagement

In 2025, GSMA communications focused on expanding reach and influence, positioning the organisation as a prominent thought leader on innovation, next-generation networks, digital inclusion, sustainability and global policy.

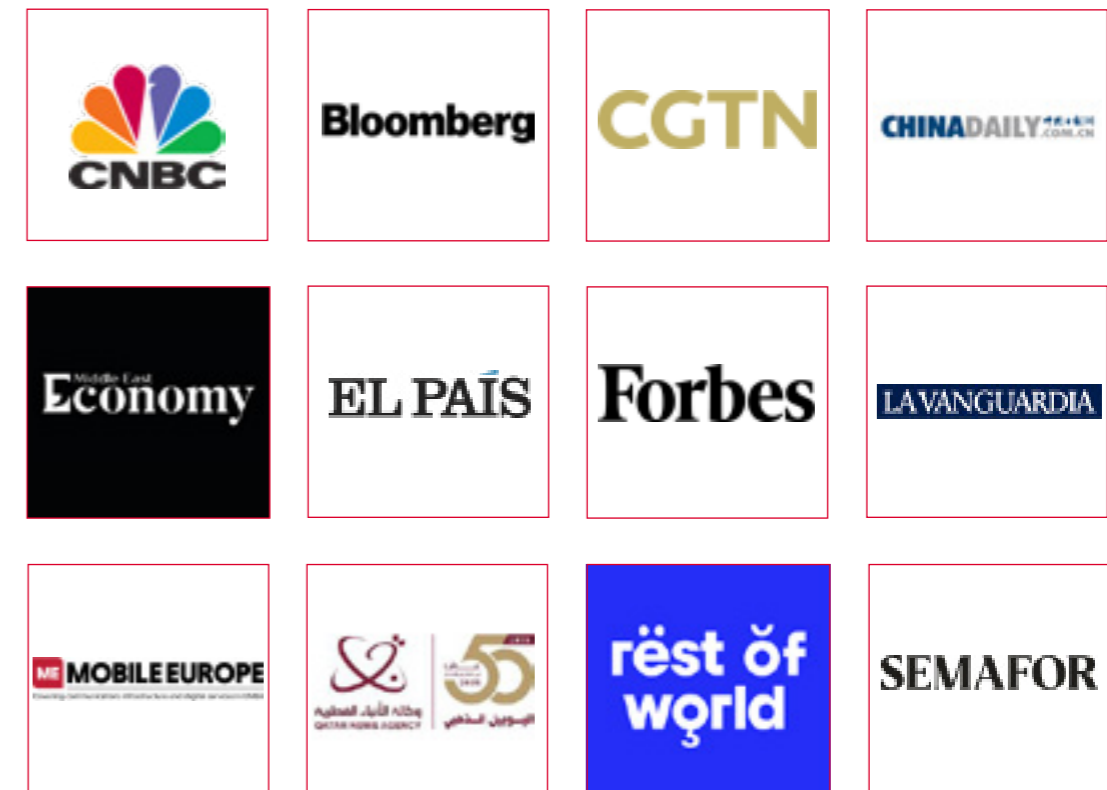
The year commenced with announcements of the Board appointments of Gopal Vittal as Chairman and Ralph Mupita as Deputy Chairman. High-profile outreach at MWC25 Barcelona generated 182,000 global media mentions, with 129 interviews for 31 spokespeople, a 23% year-on-year increase. AI's role in the telecoms industry dominated headlines in Barcelona, followed by regulatory topics, particularly around the different approaches taken in the US and the EU, and the ongoing challenges of telecom consolidation in Europe. GSMA Open Gateway, 5G networks, security, *The Mobile Economy 2025: Europe* report and infrastructure investment all achieved high visibility.

After MWC25 Barcelona, GSMA Open Gateway remained in focus, as well as broader themes, such as 5G, satellite connectivity and security, all reinforcing GSMA thought leadership across prominent media titles. GSMA Foundry's media impact grew significantly, with coverage up 16% from January to October, and total reach expanding by 45%, from 2.4 billion in 2024 to 3.5 billion.

There was also substantial media coverage of societal impact, in particular the usage gap, handset affordability, and GSMA reports, such as *The Mobile Gender Gap 2025* and *Mobile Net Zero 2025: State of the Industry on Climate Action*. The *State of Mobile Internet Connectivity 2025* report secured more than 1,500 media features, reaching over three billion people worldwide.

In Europe, a year-long campaign to support the progress of the Digital Networks Act was spearheaded by a redoubling of media relations efforts, with Vivek Badrinath meeting with journalists from the Financial Times, Politico, Reuters, the Wall Street Journal, El País and MLex. A letter to European Commission President Ursula von der Leyen drafted and coordinated by the GSMA and co-signed by 21 members, restating the need for bold regulatory reform, made headlines across Europe, with more than 40 pieces of coverage.

MWC25 Shanghai, M360 Eurasia, and M360 LATAM attracted tier-one media coverage, further elevating the GSMA's visibility in regions, which continued at MWC25 Las Vegas, MWC25 Kigali, and the inaugural MWC25 Doha, driving strong media engagement and stakeholder interaction.



Chapter 4.4

DELIVERING IMPACT FOR MEMBERS





































The GSMA discovers, develops and delivers innovation that is foundational to positive business environments for members. A profitable industry has the ability to invest and drive usage, empower consumers and enterprise, and propel large-scale economic growth. Efforts at the forefront in 2025 included advancing connectivity, advocating to governments, and building trust.

Extending advanced connectivity

5G Standalone and 5G Advanced

Working with mobile operators, the GSMA 5G Future Community is accelerating the adoption and development of 5G standalone (SA) and 5G-Advanced networks, which bring compelling new capabilities to the mobile ecosystem. The community is exploring how 5G SA provides the foundation for advanced services, such as network

slicing, edge computing, and massive IoT, enabling operators and enterprises to deliver differentiated, future-ready experiences. As the industry moves toward 5G SA, members are empowered to capitalise on new monetisation opportunities, support the seamless evolution to 5G Advanced, and lay the groundwork for 6G.

5G-Advanced Features	5G SA	5G NSA
 Massive IoT	 Supported	 Not Supported
 URLLC	 Supported	 Not Supported
 Non-Public Networks (Private 5G)	 Supported	 Limited Support
 Power efficiency	 Supported	 Limited Support
 Network slicing	 Supported	 Not Supported
 AR/VR	 Supported	 Not Supported
 Location and positioning	 Supported	 Limited Support
 Uplink boost	 Supported	 Not Supported
 Live broadcast	 Supported	 Not Supported
 AI / ML Integration	 Supported	 Limited Support
 RAN Control Loops	 Supported	 Limited Support
 Network Sensing	 Supported	 Limited Support



In 2025, the 5G Future Community brought together over 2,000 director-level and senior industry contacts through the MWC series and quarterly webinars, driving high-level dialogue, knowledge exchange, and actionable partnerships. This engagement fuelled a 29% year-on-year growth in the Community's subscriber base, which now exceeds 22,000, and expanded the Community's digital reach with more than 700 new followers on the GSMA Networks' LinkedIn showcase page.

Demonstrating the appetite for expert insights, the 5G Future Community recorded over 1,500 web form completions, enabling members to access exclusive thought leadership and in-depth perspectives from community and action groups experts.

To further help mobile operators extend the scope and capabilities of 5G networks, the GSMA now runs four network-related communities:

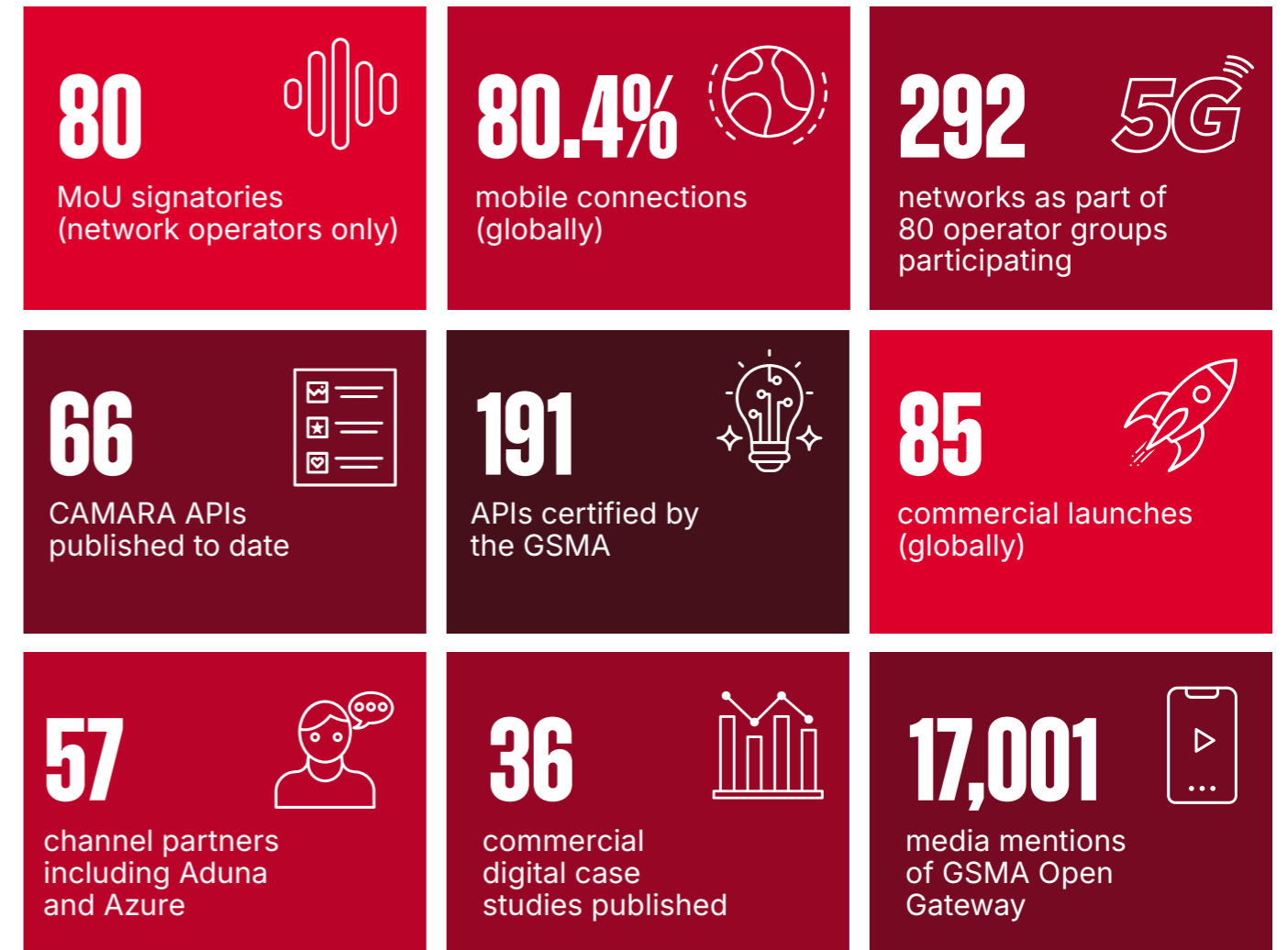
- The **GSMA's Open Gateway** initiative, which fosters the use of standardised application programming interfaces (APIs) to monetise advanced network capabilities.
- The **Private Networks Community**, where enhanced security and capabilities are key to unlocking enterprise revenues in certain industry verticals.
- The **Non-Terrestrial Networks (NTN) Community**, which is fostering adoption of standards-based NTN solutions on a single module and unlocking new opportunities for enterprises and consumers.
- The **6G Community and Mobile AI Community**, which both support the continual evolution of network technology.

GSMA Open Gateway

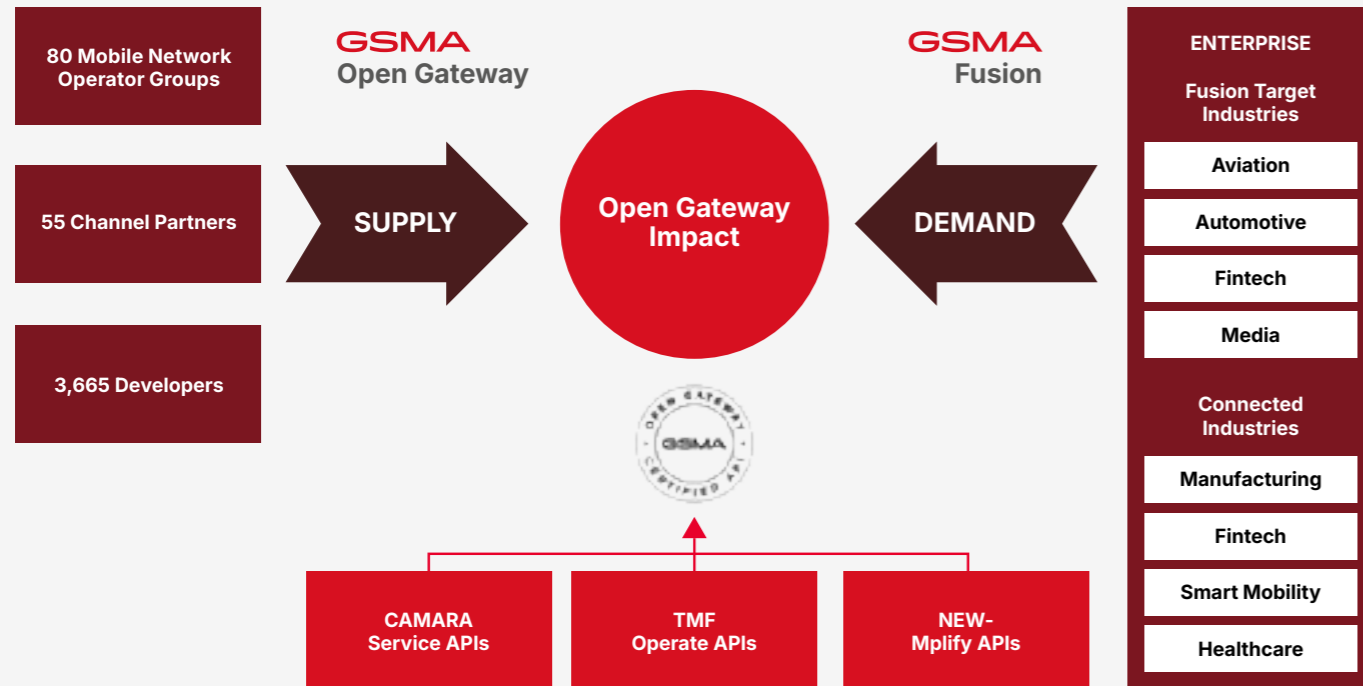
Monetisation of 5G networks using standardised network APIs is a key focus for many mobile operators globally. In 2025, the Open Gateway programme saw a 20% increase in the number of Memorandum of Understanding (MoU) signatories to 80 operator groups, and a 200% increase in the number of channel partners to 58. With over 290 mobile networks (as part of 80 operator groups)

offering access to network APIs, adoption has grown to cover 80.4% of global mobile connections.

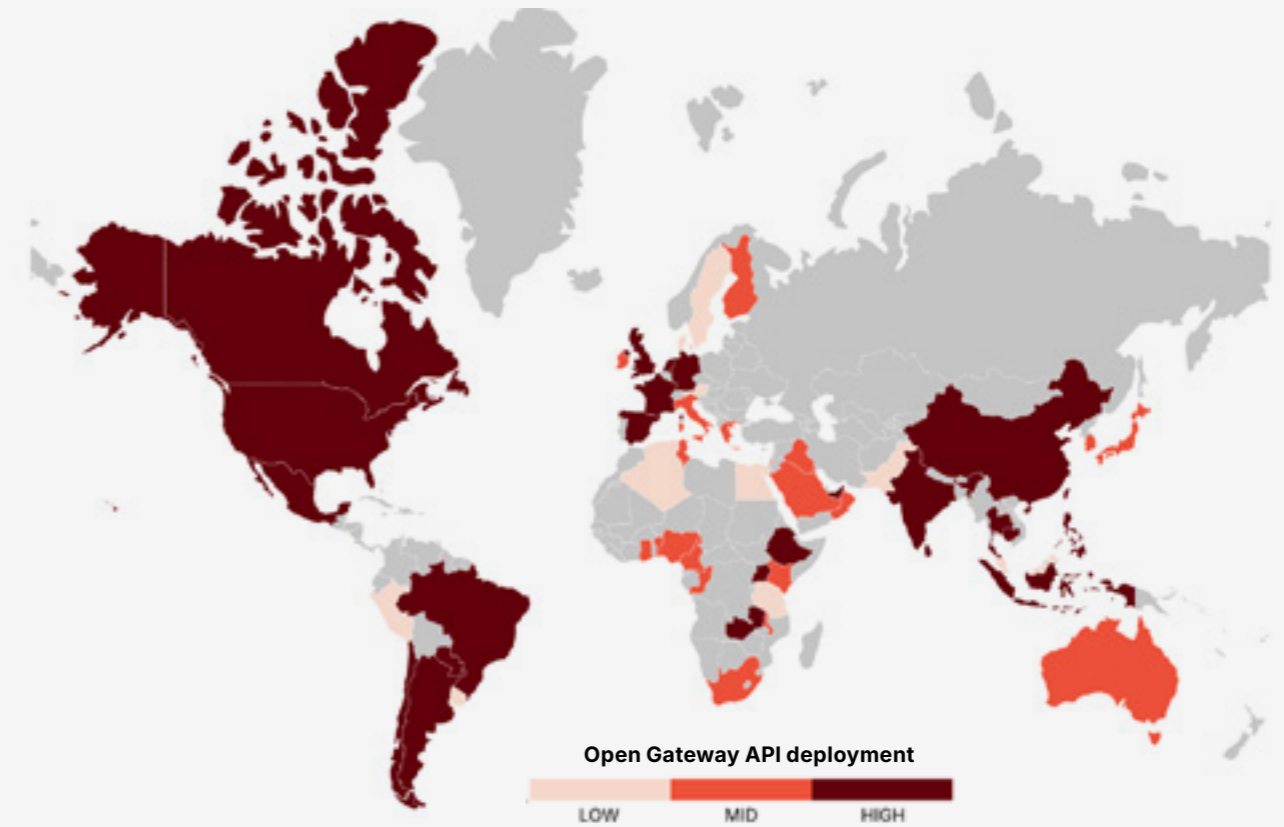
The GSMA works with mobile network operators in each national market to make standardised identity and anti-fraud APIs available so that developers can employ them to reach a wider audience and ensure a consolidated approach to combatting fraud.



Beyond Open Gateway



GSMA Open Gateway APIs deployed*



*as of 30 November 2025

The GSMA's network API certification programme saw the number of certified APIs grow from 85 in 2024 to 191 in 2025, with a significant pipeline. Channel partners, in particular, recognise that certification of network APIs is essential to scalability, and national and international implementation.

CAMARA, which works closely with the GSMA to align API requirements and publish API definitions and APIs, identified a significant number of "Advanced APIs" that support true network programmability and features unique to 5G network capabilities, many of which are available for deployment today. In October, Mplify, formerly the Metro Ethernet Forum (MEF), joined the Open Gateway Community contributing APIs across mobile and fixed network offerings. For operational reasons, the GSMA manages the Scam Signal API which is only available to network operators.

As well as working with the mobile operator community (supply side) to maintain the current trajectory of growth, the GSMA increased its engagement with channel partners, developers and enterprise industry verticals (demand side) through the new GSMA Fusion programme.

The Fusion programme made strong inroads into the fintech market with FICO, Skydio and Tata Elxsi signing Market Demand Indicators (MDI), which invite mobile operators and channel partners to expose specific network capabilities to meet the specific needs of vertical markets. The Fusion team also engaged with innovators within automotive, aviation and media industries to advance more MDIs.

The GSMA maintains a case study library showcasing over 37 live commercial executions globally, evenly spread across Americas, Asia and Europe. API deployment data is also available in the [Open Gateway Portal](#) which was expanded in 2025 to offer a full developer programme and sandbox to enable any developers to learn about and experiment with CAMARA network APIs.

In **Africa**, Cell C, MTN and Telkom South Africa collaborated to implement Sim Swap and Number Verify APIs to combat fraud in South Africa, and mobile operators in Nigeria prioritised Number Verify and SIM Swap APIs, which address urgent fraud and identity challenges and are already approved by regulators in key markets.

Open Gateway adoption accelerated across **Asia Pacific**, as India, Malaysia and Indonesia announced plans to commercialise federated APIs before MWC26 Barcelona, marking an important step toward interoperability. There have been deployments of anti-fraud APIs, such as SIM Swap and Number Verification, along with Quality on Demand (QoD) and Know Your Customer (KYC) APIs, with live launches in Singapore, Malaysia,

Vietnam, Cambodia, Sri Lanka, and the Philippines. Initial cross-border federation between mobile operators in Malaysia, Indonesia, Singapore and Thailand will act as a foundation for federation across ASEAN within 2026.

Europe remains the most active market for network API deployments thanks to the activities of the major European mobile operator groups and the maturity of their developer programmes. In the UK, operators are working collaboratively in response to the UK's [Online Safety Act 2023](#) to introduce an Age Verification API. In France, the four largest mobile network operators have coordinated the deployment of Number Verify, SIM Swap and KYC (know-your customer) Match APIs to combat fraud. They are working with more than 20 organisations including BforBank (the online branch of Credit Agricole) and Fortuneo (a subsidiary of Credit Mutuel Arkéa). In Spain, the three main mobile network operators are also collaborating to combat fraud, as well as using other APIs, such as Quality-on-Demand (QoD) for healthcare, and Number Verify to improve service sign-up for Cabify ride-share service.

All fourteen operators in **Greater China** have signed the Open Gateway MoU and the region now ranks first in terms of the volume of API proposals approved in CAMARA. At the 2025 Global Mobile Awards (GLOMOs) the winner of the Open Gateway Challenge was a collaboration between China Mobile, Alibaba Cloud Computing, ByteDance and ZTE for the AaaS Open Gateway Platform working with Alipay and TikTok. At MWC25 Barcelona, China Unicom ran an Open Gateway Innovation challenge and China Telecom showcased TeleNavi, an AI-driven ride share application for the elderly and people with visual impairments, by integrating GSMA Open Gateway APIs with its own TeleChat large language model.

In **Latin America**, 20 operators are now offering commercial API solutions, following the launch of a multi-operator collaboration in Mexico and a market launch in Paraguay. MoU signatories represent 93% of the region’s mobile connections.

Strong momentum was achieved in the **Middle East and North Africa**, where Market Champion programmes launched in Turkey, Egypt, Saudi Arabia and Qatar. The GSMA facilitated strategic

operator introductions in the Kingdom of Saudi Arabia, Bahrain and Kuwait to drive early adoption and ecosystem collaboration.

In **North America**, mobile operators launched a wide range of network APIs, including Device Status, SIM-Swap, Number Verification, Edge Compute, and QoD, while Caribbean operators explored Open Gateway APIs, showing an interest in leveraging programmable networks for tourism, logistics and disaster response applications.

GSMA Open Gateway directly engaged with 3,665 developers in 2025, up from around 637 in 2024. To further support this community the GSMA ran two hackathons, at MWC25 Barcelona and India Mobile Congress, to drive collaboration between developers, channel partners and operators. The hackathon in Delhi achieved more than 2,300 registrations, 260 viable concepts, and an impressive shortlist of network API-based solutions to business challenges.



Mobile Identity

In 2025, the global rollout and commercial deployment of interoperable identity and fraud-prevention APIs continued to accelerate under the GSMA Open Gateway initiative. This momentum reflects growing enterprise demand for digital transformation tools that tackle critical challenges, such as the surge in AI-enabled fraud and scams, as well as increased regulatory focus on age assurance and responsible AI use.

The GSMA published *Introduction to Mobile Identity*, with case studies that demonstrate the positive business impact of Mobile Identity solutions, which achieved higher than average downloads. These insights were further explored in a webinar in October, which achieved 1,600 views and 158 engagements.

Throughout 2025, the GSMA Identity and Data Community focused on the evolution of mobile authentication, Mobile Identity APIs, and trusted communications. Through online events, the community engaged with 145 unique member companies, achieving 55% year-on-year growth in participant numbers and 32% in participating companies.

At MWC25 Barcelona, the inaugural Mobile Identity Summit convened 15 speakers and attracted an audience of more than 400 participants, united by a shared goal to strengthen digital trust through Mobile Identity.

Private Networks Community

The GSMA Private Networks Community, launched at MWC25 Doha, is initially focused on clarifying deployment models, architectures, and commercial pathways for private networks, addressing industry confusion and supporting informed decision-making for mobile operators, enterprises and regulators. The Private Networks Community’s technical priorities focus on bridging Proof of Concept (PoC) to production, providing deployment guides, best practices, and case studies, supporting device and spectrum availability, security and IT/OT integration. It is also exploring the business case for private networks and promoting knowledge sharing through workshops, events, and white papers, with future work on positioning and time-sensitive networking.



Non-Terrestrial Networks Community

In 2025, the GSMA Non-Terrestrial Networks (NTNs) Community continued to grow as a collaborative hub uniting mobile operators, satellite providers and vendors to accelerate the integration of terrestrial and non-terrestrial networks. NTN is a complement to terrestrial mobile infrastructure, and can help in bridging connectivity gaps for remote and underserved regions. NTN technologies leveraging (GEO/LEO/MEO) satellites, high-altitude platforms (HAPS), and uncrewed aircraft systems (UAS), present promising solutions to overcome the limitations of terrestrial networks.

Expert members in the GSMA NTN Community address key technical and interoperability challenges as NTNs evolve to support direct-to-device connectivity and enable integration with 5G and future 6G networks.

In 2025, the Community published *Non-Terrestrial Networks – Opportunities and Challenges* providing a landscape overview of NTN opportunities and challenges, achieving 600 downloads which reflect strong market interest. More than 50 GSMA members participate in monthly meetings to share insights, align on priorities, and drive progress. Overall engagement saw a 409% increase in website visits to the NTN Community webpage year-on-year.

The Satellite & NTN Summit series, hosted by GSMA Intelligence at MWCs, covered both the technical and business dimensions of the evolution of satellites, and attracted more than 900 attendees from across the industry. GSMA NTN webinars achieved 319 registrations, and visibility was boosted by the GSMA's presence at World Space Business Week in Paris. To support policy-makers and regulators, the GSMA NTN team and GSMA Advance launched a dedicated [NTN training course](#), which has seen 20 participants enrolled to date.

6G Community

New in September 2025, the GSMA 6G Community is developing cloud-native, service-based reference architectures that provide the modularity, elasticity and scalability required for future network deployments, and brought together 85 participants from across the global telecoms and technology landscape. At the first meeting, a survey was developed and circulated among members to define and prioritise collaborative study topics for 2026. This data-driven approach ensures that member needs and industry priorities remain aligned and that collaborative working streams focus on areas with the greatest potential to accelerate innovation and commercial maturity.

Massive IoT

In 2025, the industry passed one billion NB-IoT and LTE-M connections (up from about 890 million at the end of 2024), following a decade of GSMA leadership and mobile industry innovation. This milestone validates years of GSMA coordinated action to build a global infrastructure for Massive IoT. Having convened mobile operators and industry members to help develop the NB-IoT and LTE-M specifications, the GSMA has assembled experts to solve specific challenges, including power optimisation, roaming agreements, and device certification through project groups, board-level support, white papers, and Mobile IoT summits. The IoT Strategy Group continues to support the future of the IoT with the development of complementary 5G technologies, RedCap and eRedCap, which address new Massive IoT market requirements.



Advocating to governments

At the behest of members, the GSMA applied its regulatory and policy expertise extensively in 2025 and facilitated industry positions on issues that most occupied national governments. Where political timelines can typically be lengthy, consistent access to the right ministry and regulator drives impact.

GSMA experts engaged with governments at every opportunity throughout the year and across the world, from bilateral meetings to large-scale events.

The **GSMA Ministerial Programme at MWC25 Barcelona** brought together **188 delegations** from **148 countries** and **40 intergovernmental organisations**, including **66 ministers** and **111 heads of regulatory authorities**, to meet with the mobile industry and discuss their most prominent challenges. **In 2025, Ministerial Programmes were also incorporated into MWC25 Kigali and the inaugural MWC25 Doha.**



Africa

- Following advocacy by the GSMA, the Nigerian Communications Commission approved and implemented a 50% retail tariff price increase to support the **sustainability of investment** in the sector.
- In line with the GSMA's recommendations, 12 of Nigeria's 36 states officially waived right-of-way (RoW) fees in April to attract telecom infrastructure investments. While RoW is just one component in the cost breakdown of **fibre deployment**, it is a good first step to incentivise investment, and stimulating local demand is another crucial step in this process.
- The new Senegal data protection framework Law No. 2008-12 referred to part of the GSMA guiding principles for **smart data privacy laws** (local context, data privacy frameworks, principles-based, consent and lawful grounds for processing, rights, data breach notification, cross-border data flows).
- GSMA positions were adopted in Ethiopia's National Digital Payments Strategy 2025-2029, resulting from ongoing collaboration with the government to advance **inclusive digital finance**.
- The Pan-African Parliament Committee on Health, Labour and Social Affairs and Committee on Transport, Industry, Communications, Energy, Science and Technology (part of the African Union) adopted the GSMA's *Enabling Digital Health in Africa* and *Enabling Smart Manufacturing in Africa* reports at the 5th Ordinary session of the 6th Parliament.





Asia Pacific

- In September, the GSMA hosted a multi-stakeholder roundtable in Dhaka, Bangladesh, to promote the GSMA report: *The Impact of Spectrum Pricing in Bangladesh*. The economic modelling shows that high spectrum fees hinder network investment and slow digital transformation, and recommended transparent, predictable, and **investment-friendly pricing**. This was well received by policymakers, industry leaders, and media, and reinforced momentum towards reform, and feeds into work ahead of February 2026 elections.
- In Cambodia, the GSMA successfully advocated for a **market-driven approach to 5G deployment**, influencing government decision-making at a critical time when a single wholesale network model was under serious consideration.
- The GSMA contributed to KomDigi's public consultation on Indonesia's National AI Roadmap, advocating for responsible and inclusive AI development and driving attention to policy coherence, robust data governance, and trusted frameworks – critical enablers for **accelerating innovation**.
- In April, the Malaysia Personal Data Protection Commissioner published **Cross-Border Personal Data Transfer Guidelines**, and the GSMA's responses to its consultation, on transfer impact assessment, standard contractual clauses and binding corporate rules, are reflected in the guidelines.
- The GSMA deepened its partnership with Pakistan's PTA, MoITT, NDMA and mobile operators, to strengthen **national disaster resilience** using mobile-enabled technologies, by reviewing ongoing pilots to integrate early warning systems with the National Management Authority in September.
- The government of Vietnam introduced a subsidy to **accelerate 5G deployment**, offering financial support to mobile operators for building 20,000 5G base stations by 2025, after extensive GSMA advocacy to ease the investment burden. The subsidy covers 15% of base station equipment costs in 2025, capped at the revenue generated from last year's auction.



Europe and CIS

MWC Barcelona is a key platform for direct engagement with European governments and policymakers, while Brussels-based policy events and direct European outreach serves to advocate for industry positions at the EU level.

- At MWC Barcelona 2025, the GSMA welcomed two European Commission Executive Vice-Presidents – Henna Virkkunen and Teresa Ribera, alongside 21 national regulatory authorities, several EU Ministers, and numerous MEPs, for high-level roundtables, keynotes and industry meetings. These sessions provided a crucial opportunity to align policy priorities and advance the **connectivity agenda for Europe**. Beyond Barcelona, the GSMA actively engaged with EU 27 ministries, including those of Denmark, Cyprus, Ireland, Belgium and Germany.
- The GSMA organised a **Danish EU Presidency** event in Copenhagen in June. All five CEOs from Denmark's telecoms industry appeared together on stage with a unified message – calling for greater scale in Europe's telecoms sector. Two Danish Ministers responsible for telecommunications and security delivered keynote remarks and engaged directly with industry leaders. The GSMA facilitated these exchanges through a ministerial dialogue ahead of Denmark's EU Presidency, as well as discussions with the European Commission.
- Director General Vivek Badrinath engaged with **leading European policymakers**, including European Commissioners, MEPs and national ministers. His onstage interview with Politico on *Europe's Big Bet on Connectivity* attracted strong attendance from European Commission officials and Member State representatives.
- As well as responding to consultations and running workshops on topics, such as spectrum policy, infrastructure investment and competition policy, the GSMA commissioned economic studies on key issues including the EU investment gap, spectrum pricing, dynamic effects of mergers, and network cloudification, to coincide with **key milestones in the legislative review**.
- In Eurasia, the GSMA's collaboration with governments and mobile industry leaders centred around M360 Eurasia 2025 and advocacy in regional policy fora. M360 Eurasia 2025 convened seven ministers and regulatory heads to Tashkent, Uzbekistan, with a combined high-level policy dialogue and the Eurasia CEO Roundtable. Supporting the central conversations, the GSMA published *Mobile Sector Taxation in Eurasia* which led to the **removal of excise duties on mobile services** in Uzbekistan.
- The GSMA agreed regulatory and international cooperation with the Regional Commonwealth in the Field of Communications (RCC), under the Chairmanship of the Minister of Digital Technologies of Uzbekistan. The RCC formally accepted the **GSMA's contribution on ITU Resolution 37** as the joint regional position for the World Telecommunication Development Conference 2025 (WTDC-25) in November. This ensured that the CIS region would advocate for addressing the usage gap, as a priority in bridging the digital divide, rather than focusing solely on coverage expansion.





Greater China

- The GSMA Policy Leaders Forum at MWC25 Shanghai convened **35 international government delegations**, who discussed NTN/D2D, 5G monetisation, 6G spectrum and digital inclusion.
- The GSMA joined the **World Data Organisation** to deepen collaboration with the data ecosystem for thought leadership and MWC Shanghai expansion.
- By collaborating with industry stakeholders to communicate with regulators and showcase ecosystem readiness, the GSMA helped secure **eSIM permits for smartphones** in China.
- The GSMA formed a strategic partnership with the United Nations Industrial Development Organization (UNIDO) to foster **more international participation and collaboration**.



North America

- To influence and inform the FCC’s plans to lift the federal bans on jammers to allow for **targeted jamming** in state and local prisons, the GSMA commissioned a study outlining how different markets around the world handle this issue, and the technology available.



Middle East and North Africa

- Following GSMA input at dedicated workshop in Istanbul, the Iraqi regulator CMC has built a consensus on **spectrum interference** issues amongst policymakers, mobile network operators and vendors.
- The Kuwaiti regulator CITRA agreed to delay the Kuwait City Municipality’s ordinance on cellular towers, after a GSMA workshop to promote international **harmonization on EMF**. All stakeholders will cooperate towards updating the Council’s antenna deployment policy to cover existing and new locations.

Capacity Building

GSMA Capacity Building develops and delivers specialised free training for policymakers and regulators on the key issues shaping the future of mobile connectivity. Certified by the United Kingdom Telecoms Academy (UKTA) and accredited for Continuing Professional Development, these training courses support the GSMA’s advocacy efforts, ensuring that regulatory frameworks enhance global connectivity and digital inclusion.

Between 2024 Q4 and 2025 Q3, 1,870 policymakers and regulators participated in online or face-to-face training. The feedback survey found that 99% of participants would recommend the courses to others, and 95% said the training was directly useful in their work.

Two new courses launched in 2025 – *Mobile Connectivity and the AI Revolution* and *Mobile Technology for Humanitarian Emergencies*. In addition, two masterclasses, held in partnership with the Malaysian Communications and Multimedia Commission and Multimedia University in Kuala Lumpur, equipped delegates with critical insights on AI, 5G, network investment, spectrum pricing and more.

Across all regions, 14 face-to-face training sessions covered policy areas including AI, cybersecurity, and spectrum management. Training was delivered at MWCs throughout 2025, and an MoU was signed with UNDP Egypt at Barcelona, to deliver GSMA courses to policymakers and regulators from Egypt’s NTRA and their sub-regional counterparts.

Cybersecurity in the Context of Mobile Telecoms training, co-hosted by the GSMA and TRC-Jordan, gained national media coverage, with Commissioner Ayman Daraiseh highlighting its role in advancing the country’s Royal directive to build national expertise. The GSMA and TRC-Jordan are working towards an MoU to deliver further training in the MENA region in 2026 and beyond.

In partnership with the ITU Academy, the GSMA delivered five virtual training courses to regulatory stakeholders worldwide, covering topics including radio signals and health, climate change and mobile connectivity and the AI revolution.

“I liked that the GSMA Capacity Building course was based on facts and data. The recommendations for addressing the challenges were easy to understand and implement. I also appreciated the real-life examples of how various countries are applying some of these strategies to reduce the gender gap.”

Brenda Oyella,
Officer Competition Affairs,
UCC, Uganda

“Through the GSMA Capacity Building Spectrum face-to-face training, we gained valuable insights into the diverse policies and regulatory frameworks applied across different countries and organisations. The course deepened our understanding of how mobile communication plays a fundamental role in the economy, not only nationally, but also regionally and globally.

The opportunity to participate in person was especially meaningful, as it allowed for direct engagement and knowledge exchange. We are deeply grateful to the GSMA for the high level of excellence demonstrated by its expert trainers and for making these courses accessible free of charge.”

Javier Luque,
Supervisor at OSIPTEL headquarters, Peru



Addressing investment challenges

Mobile operators continue to face challenges, such as market distortions and regulatory burdens, that can make it difficult to maintain and extend their networks to meet growing demand. The combined

efforts of the GSMA and its members have placed this topic firmly on the digital policy agenda, stimulating debate and discussions in regions and countries around the world.



Asia Pacific

- The GSMA conducted a landmark study, *Mobile Investment Gaps: Pacific Islands*, across 23 Pacific Island markets, which identified a US\$1.8 billion investment gap to achieve near universal 4G coverage and adoption by 2030, and presented it at the PITA AGM in Honiara and to ICT Ministers in the region.



Africa

- In its new Universal Service Fund Strategy 2023-2027, the Communication Authority of Kenya directly adopted one of the GSMA's key recommendations – the establishment of a project costing system that accounts for overheads, which translates into a **CAPEX/OPEX subsidy**.



Europe

- The GSMA engaged extensively with policymakers with respect to the Digital Networks Act, a major overhaul of the EU regulatory framework for telecommunications, and on **merger policy reforms**, both of which could stimulate further investments. In October 23 telecommunications and connectivity leaders issued a joint call to President von der Leyen with a joint message "A competitive Europe means a digital Europe".



Latin America

- Following the GSMA Fair Share advocacy, Meta and América Móvil, and separately Telefónica, reached agreements to improve **efficiency in network traffic** by up to 15%, across 15 markets in the region.
- A GSMA marketing communications campaign on **digital inclusion** in Colombia achieved high visibility and engagement, impacting directly and indirectly around 50% of the population, and strengthening the inclusion of Fair Share within the country's regulatory agenda.



Middle East and North Africa

- The GSMA supported 5G launches in Egypt and Tunisia and celebrated a 5G innovation award in Algeria, marking progress toward bridging the region's digital infrastructure investment gap.



Securing spectrum capacity

The GSMA's work on spectrum ensures members have access to the capacity they need to innovate and expand connectivity. Through advocacy on spectrum regulation, the GSMA delivers policies that increase digital equality and address the usage and coverage gaps. There are four current priorities:

- **Licensing and pricing:** ensuring that spectrum prices remain reasonable
- **6 GHz:** ensuring mobile network operators can access the upper 6 GHz band
- **Future spectrum and WRC:** planning for spectrum in the 2030s
- **D2D (direct-to-device) satellite connectivity:** bringing a new, supplemental technology to market

In 2025, the GSMA continued to advocate for best practice around the world in spectrum pricing, investment-friendly conditions, set-asides, auctions, renewals, roadmaps, technology neutrality and rural connectivity. The GSMA published the updated *Global Spectrum Pricing* report, using its findings to encourage best-practice policies from regulators. The *5G Spectrum Public Policy Paper* was re-released to reflect policy imperatives as 5G matures.

The GSMA advocated for the use of the upper 6 GHz band for full-power mobile, in opposition to big tech and its industry associations, and published regional versions of the *Mobile Evolution in 6 GHz* report for Europe and LATAM

which produced clear results. Since the World Radiocommunication Conference in 2023 (WRC-23), Hong Kong and UAE assigned 6 GHz spectrum to operators, and Australia, Bangladesh, Brazil, Cambodia, China, India, Indonesia, Thailand, and Vietnam all included it in their national spectrum plans. Detailed advocacy activity took place across Europe which led to the EU-wide opinion on 6 GHz, which aims to allow for 665-700 MHz of spectrum in the band 6.425-7.250 GHz, but awaits a final decision after WRC-27.

On future spectrum, in 2025 the GSMA continued leading the mobile industry to WRC-27, by participating in the ITU's working party structure and negotiating technical parameters and conditions for coexisting alongside other spectrum users. The GSMA published its *Vision 2040: Spectrum for the Future of Mobile Connectivity*, a pioneering piece of work that will guide global views on spectrum requirements during the height of the 6G era in the late 2030s.

D2D satellite connectivity is a new policy area which impacts many GSMA members. In early 2025, the new D2D Spectrum Task Force finalised its guidance for regulators, forming the basis for *Spectrum for D2D: The use of satellite to supplement mobile coverage*, published in September. Work on technical measures for international coexistence of satellite D2D services is ongoing, under the auspices of the ITU. The GSMA is working to find solutions for the safe coexistence of all technologies.



Africa



- The Nigerian Communications Commission (NCC) unveiled a five-year national spectrum roadmap, the *Spectrum Management and Allocation Blueprint (2025–2030)*, to accelerate **4G densification** and support the gradual **expansion of 5G** across the country, while improving access in underserved rural areas. In line with GSMA recommendations, the roadmap supports sustainable investments and strengthens the National Broadband Plan (2020–2025), which targets 70 per cent broadband penetration by 2025.
- Following advocacy by the GSMA, all mobile operators in Ghana can now use their **spectrum for any mobile technology**. Additional spectrum was assigned to MTN Ghana, and an offer of further spectrum was made to Telecel Ghana.
- In line with GSMA recommendations, the Tanzanian regulator TCRA allowed the successful bidders in the 3.5 GHz auction to **pay for licenses in four instalments** within eighteen months of the auction date, giving operators time to mobilise the necessary resources, with licenses issued upon payment for the first instalment.





Asia Pacific

- In line with global trends and the GSMA's long-standing spectrum pricing campaign, Australia extended until 2032 all spectrum licenses **that were due to expire, at reasonable prices.**
- The Bangladesh Telecommunication Regulatory Commission (BTRC) plans to auction the **700 MHz band** in January 2026, a critical low-band resource for 4G expansion and future 5G. This follows GSMA advocacy for the full release of the band to avoid artificial scarcity and to align reserve prices with market conditions and global benchmarks. Grameenphone and Robi have begun limited 5G rollouts in high-value urban hubs.
- Following sustained GSMA advocacy, technical submissions, and consultations with the Department of Telecommunications (DoT) and TRAI, India decided to reserve the **upper 6 GHz band** (6425–7125 MHz) for IMT. This is a key step in addressing future mid-band spectrum needs for 5G and beyond and is a sign of global economies of scale for the band.
- In September, the GSMA influenced Pakistan's spectrum policy by presenting to the government's Auction Advisory Committee, drawing on the report *Building Digital Pakistan Through Effective Spectrum Policy* to provide regional benchmarks and economic modelling, ahead of Pakistan's **5G rollout** in early 2026.
- Following industry engagement and GSMA input, the government of Thailand published a spectrum auction focused on the continued use of key bands, offering only the relevant ranges aligned with mobile operators' interests.
- Following continued GSMA engagement, the government of Vietnam has successfully concluded the **700 MHz spectrum auction**, unlocking a critical band for mobile broadband, enhancing 4G and paving the way for 5G expansion.
- In line with GSMA recommendations, Vietnam held auctions that offered 3.5 GHz spectrum at a **sustainable price.**



Greater China

- As China's government focuses on securing more spectrum for satellite connectivity, the GSMA engaged with the Ministry of Industry and Information Technology (MIIT) and Chinese industry to make the case for also ensuring that 6G will be able to access spectrum above 7 GHz.

Latin America

- In Peru, 3.5 GHz **spectrum prices** were cut by 50%, adopting GSMA best practice across spectrum pricing and auctions.
- After GSMA engagement with the regulator Anatel, and in response to WRC-23's IMT identification of the **upper 6 GHz range**, the government of Brazil added the 6.425–7.125 GHz band to mobile use in the table of allocations, with plans for assignment in 2026.



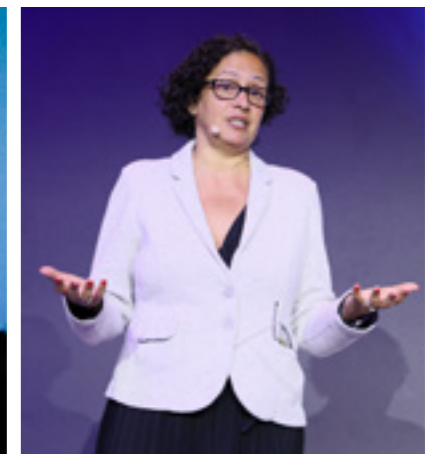
Middle East and North Africa

- Morocco awarded 5G licences with sufficient, cost-effective spectrum for all three mobile network operators, after receiving input from local mobile operators based on the GSMA's recommendations.
- GSMA engagement and an in-market spectrum pricing study informed a decision by the government of Turkey to reduce 3.5 GHz **auction prices**, ensuring affordability and supporting 5G rollout.
- **Commercial 5G** became a reality in Egypt, following the 2024 granting of 5G licences at a fraction of the initial cost, using the already-assigned 2.6 GHz band. With active support from the GSMA, the regulator is developing a roadmap for additional spectrum, marking a significant step forward in Egypt's digital transformation and alignment with global spectrum trends.



North America

- Recognising that US midband spectrum assignment lagged behind international counterparts, the US Congress passed legislation to require 800 MHz of midband spectrum (1.3 and 10.5 GHz) to be identified for auction. With 500 MHz of the total to come from Federal sources, the GSMA is supporting **industry and government efforts to identify potential bands.**



Modernising satellite regulation

In 2025, the GSMA significantly accelerated its regulatory work on satellite and mobile coexistence in response to rapid market developments and growing member engagement. This work focused on building practical, evidence-based insight for members and shaping early GSMA messaging on regulatory parity. The Satellite Industry Analysis and Satellite Regulatory Review in Africa reports give members a clear view of satellite capabilities and regulatory challenges, strengthening the GSMA's engagement with policymakers.

Following GSMA advice, the Tanzanian regulator TCRA released new guidelines making it mandatory for satellite network operators to partner with licensed mobile network operators before deploying satellite services. The guidelines ensure that innovation in satellite connectivity is integrated into the existing national telecommunications ecosystem rather than bypassing it. By requiring partnerships with mobile operators, Tanzania safeguards local investment, maintains spectrum regulatory control, and sets an example in Africa for policy formulation on satellite-to-mobile integration.

Drawing on these reports, the GSMA convened a closed-door roundtable with 10 regulators and three regional associations at MWC25 Kigali in October, generating open, forward-looking discussions and direct requests from regulators for GSMA input on next steps. This momentum was reinforced through a joint policy group, strategy group and technology group workshop at the GSMA Board meeting in Chengdu, that helped cross-pollinate insights between member expert groups and inspired potential areas for future work.

The GSMA Board endorsed the continuation of this work, agreeing that the GSMA should further develop a global policy paper based on the principle of "same service – same rules." The GSMA will also expand its evidence base through in-country regulatory research, assessing how direct-to consumer satellite services are regulated and how these obligations compare with those applied to mobile operators. This work will be conducted across at least one country in each region to build a consistent global view and inform future advocacy.



Reforming taxation

To make mobile services more affordable for consumers, close the usage gap, and facilitate investment in networks and services by operators, the GSMA promotes best practice principles for taxation.

It does this by publishing analysis of mobile sector tax reforms, and highlighting how broader internet adoption drives economic growth, social inclusion and, ultimately, improves public finances.

Africa

- Following extensive campaigning by the GSMA, Kenya's government lowered telecom sector taxes to **incentivise infrastructure investment and reduce consumer costs**, and reversed plans to increase excise duty on mobile services from 15% to 20%.
- In a major win for digital inclusion, South Africa's Finance Minister announced the government will remove the 9% tax on smartphones priced below R2,500, directly **supporting low-income households**, after the GSMA's sustained advocacy efforts in the region.
- In line with GSMA recommendations, the government of Ghana abolished the 1.5% **e-levy on mobile money transactions** which had been introduced in May 2022.
- In Gabon, the government reversed plans to introduce a 5% **levy on mobile money** in the 2025 finance bill, following GSMA recommendations.
- At the Conference of Ministers 2025 for African Ministers of Finance, Planning, and Economic Development, the UNECA published '*Optimizing Africa's ICT Tax Regimes Towards Economic Growth and Job Creation*', which endorsed GSMA advocacy on **tax policy formulation**. The GSMA is advocating for a gradual reduction of tax rates in the ICT sector, to optimise and enhance economic performance, improve digital access, and create jobs.
- In March, the government of Malawi removed **import duty and excise duty** on smartphones – a reform directly aligned with the GSMA's recommendations and championed by the Malawi Communications Regulatory Authority (MACRA). The reform can be traced directly to a GSMA *Mobile Connectivity Index (MCI)* workshop 12-months prior, invited by MACRA and including the Ministry of Finance, to analyse digital inclusion challenges through MCI data. Device affordability emerged as the leading barrier to mobile internet adoption, with taxation policies highlighted as a critical area for reform, and the GSMA prepared an outcome report with tailored recommendations, including reducing import duties on handsets.





Asia Pacific

- In 2025, the GSMA held policy dialogues with the governments of Pakistan and Bangladesh, which strengthened industry alignment through coordinated positions with mobile operators, and laid the groundwork for future reform.



Latin America

- Following GSMA advocacy, the government of Argentina eliminated **import tariffs** and reduced sector-specific taxes on mobile phones to boost market growth and device affordability. The import tariff was reduced from 16% to 8% and will be fully removed in January 2026. The internal tax on imported devices was halved from 19% to 9.5% and was eliminated for those manufactured in Tierra del Fuego.



Middle East and North Africa

- The GSMA's high-level engagements with ministers and heads of regulatory authorities, led to various positive outcomes, such as the development of a **spectrum roadmap** in Egypt and the launch of 5G in Tunisia with terms favourable to mobile network operators.



Building trust through cybersecurity

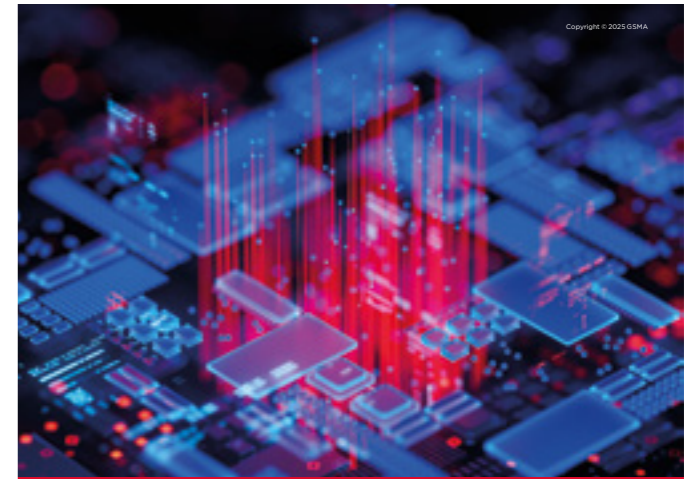
In 2025, the GSMA strengthened its global leadership in mobile security with new research, collaboration and standards adoption across the ecosystem. Of note, the *Mobile Telecommunications Security Landscape 2025 report* highlighted threat-hunting, supply-chain resilience, protecting the entire attack surface, layered defences and the importance of industry collaboration as a “defensive force-multiplier”.

The GSMA continued to advance industry collaboration through its Telecommunications Information Sharing and Analysis Centre (T-ISAC), now connecting over 160 mobile operator members, to share live threat intelligence. The convening of Chief Information Security Officers also played a pivotal role in strengthening cybersecurity leadership across the GSMA and the member operator community.

The GSMA Fraud and Security Group (FASG) unites 1,300 specialists worldwide to produce a range of new or updated threat assessments and best-practice guides, addressing areas such as device theft, SMS blasters and signalling abuse. In 2025, a comprehensive update of the GSMA's Baseline Security Controls was completed and the GSMA's *Network Equipment Security Assurance Scheme (NESAS)* document library was substantially revised.

The Coordinated Vulnerability Disclosure (CVD) programme continued to provide a trusted channel for researchers to report security issues. The GSMA's eSIM Security Assurance (eSA) certification saw further adoption, with Thales among those achieving certification to enhance secure IoT deployments, and Saudi Arabia's stc achieved full compliance with the GSMA's signalling security standards, demonstrating tangible progress in infrastructure protection.

Consumer protection remained a priority, with the GSMA leading efforts to tackle rising mobile scams, particularly in Southeast Asia, by promoting cross-channel defence strategies and regulatory collaboration (see Chapter 4.5). Through these initiatives, the GSMA continues to reinforce trust and resilience across global mobile networks, ensuring that operators, vendors and governments can respond effectively to evolving cyber threats.



GSMA Mobile Telecommunications Security Landscape 2025

GSMA

February 2025



To strengthen regional digital security in Asia Pacific, the GSMA relaunched the APAC Fraud and Security Group during the Digital Nation Summit Kuala Lumpur, ASEAN Edition, demonstrating a renewed commitment to collaborative defence against sophisticated threats across the region's mobile ecosystem, which is home to a disproportionate share of the world's “scam economy”. Complementing this effort, the Summit also hosted an exclusive APAC CISO Roundtable which brought together over 20 executive delegates from leading mobile operators.



Nurturing mobile innovation

The GSMA Foundry is driving transformative change in telecommunications through strategic partnerships and rapid deployment of cutting-edge solutions. In 2025, the Foundry delivered more than 100 innovative projects, with a strong emphasis on collaboration and industry impact. These projects included:

- **Intelligent Packet Core Foundry 2.0:** Launched in July, this project enabled mobile operators to monetise 5G investments by developing dynamic resource allocation capabilities, bringing together industry players from across the globe, including AIS, China Mobile, e&, Globe, Huawei, STC, Sunrise and Zain KSA.
- **Open Verifiable Calling:** Launched in September, this project is built on proven live deployments to restore trust in global voice communications, by embedding cryptographic proof-of-caller identity and intent into every call, combating fraud and AI-driven impersonation in global voice communications.
- **Mobile Network for Thriving AI:** A collaboration between China Mobile, Huawei, Saudi Zain, Indosat Ooredoo Hutchison, Rokid, and Unitree, this project is focused on AI service convergence and smart network evolution. After the resulting solution was implemented on China Telecom’s 5G-A x AI network, tourists could enjoy AI-guided tours around Shanghai.
- **GSMA Open-Telco LLM Benchmarks:** Through a partnership with Khalifa University, Hugging Face, The Linux Foundation, and 12 mobile operators, an open-source framework was employed to evaluate large language models for telecom tasks, supporting evidence-based AI deployment. The results highlight the need to bridge the divide between language proficiency and deterministic network reasoning. To unlock the full promise of AI-native network operations, the GSMA is advocating for a strategic “hybrid

architecture” approach, integrating foundation models with specialised components.

- **Multi-agent AI Collaboration:** A solution developed by China Mobile and ZTE reduces the need for monitoring personnel by 30% and increased network traffic by 20% at major events, demonstrating operational efficiency and cost savings.
- **Circular Economy for Network Equipment:** NetLife’s Circular Alliance facilitates equipment reuse, helping operators reduce carbon emissions and optimise costs, which could generate US\$20–30 billion of industry value.
- **AI-Powered Intelligent O&M Solution Revolutionising Telecom Fault Management:** ZTE and China Mobile’s AI-driven O&M solution slashes fault diagnosis times, cuts work orders, boosts 5G reliability, and delivers major cost savings.
- **5G-A EasyOn Robot:** A 5G-enabled private network platform by China Telecom, ZTE, DroidUp, and AgiBot, empowers seamless multi-robot collaboration across industries, unlocking real-time autonomy, modular scalability, and next-generation automation.
- **AI-Powered Smart Health Reports:** ZTE and partners developed an AI-based system to streamline medical examinations by automating reports, easing physician workload, and delivering clear, personalised health guidance.
- **Super Communications Digital Expert - Revolutionising Network Automation:** China Mobile and ZTE’s AI-driven solution slashes fault resolution times, boosts accuracy, and turns complex network operations into seamless, autonomous workflows.

Strategic partnerships

In 2025, the GSMA Foundry formed new partnerships with Circuit De Barcelona, NUHS - National University Health System, Khalifa University and Dell. The Foundry’s key strategic partnerships now include:

- **IBM** is accelerating generative AI adoption in telecoms, providing GSMA members with access to IBM’s watsonx.ai platform. Success stories include Azercell and SLTMobitel who commenced the transformation of telecom operations with IBM watsonx.
- The combining of **Khalifa University’s** research excellence with the GSMA Foundry’s extensive industry network is accelerating AI-driven solutions to address real-world challenges in network optimisation, operational efficiency, and data-driven decision-making across the mobile ecosystem.
- The Foundry’s partnership with the **European Space Agency** was renewed in September at World Space Business Week, to accelerate the integration of terrestrial and satellite networks on a global scale. Three large innovation challenges were launched at MWC25 Barcelona – the Direct-to-Device (D2D) Connectivity Challenge, the 6G Innovation Challenge, and the 5G/6G Hubs Challenge. Each offer substantial funding and opportunities to collaborate with leading organisations in the telecoms and space sectors.

- **VEON, Beeline Kazakhstan, QazCode, and BSC** developed the Kazakh-language LLM (Kaz-LLM), addressing the AI language gap for low-resource languages and powering the Kazakh AI Tutor. Containing a 70 billion parameter model with over 150 billion curated, synthesised, and translated tokens, the Kaz-LLM interacts seamlessly in Kazakh, Turkish, English, and Russian, and underpins AI Tutor, a Kazakh language learning assistant.
- **GTI 5G-AxAI Development Programme:** The New Calling x AI Challenge attracted 98 submissions from 74 organisations, including 16 universities and 52 enterprises worldwide. Winners were announced at MWC25 Shanghai, with first prizes awarded to China Mobile, STC, and Ant Digital. The Wireless Network Intelligence Challenge was also launched as part of the ongoing collaboration.
- A healthcare partnership with **Singapore’s National University Health System’s** AI and 5G-enabled innovations, such as 3D holographic surgical planning through Microsoft’s HoloLens 2, AI-driven augmented reality for precise vein detection, and next-generation hospital-at-home technology.

At MWC25 Barcelona, the Foundry Excellence Awards recognised achievements in AI, network efficiency, non-terrestrial networks, 5G monetisation, and industry vertical use cases, and the Innovation Showcase featured demonstrations in quantum security, satellite connectivity, and digital inclusion.



Attracting early-stage investment

In low-and middle-income countries (LMICs), the GSMA is dedicated to securing significant investment for digital solutions that improve the quality of life for underserved communities and drive both innovation and commercial success for mobile operators.

The GSMA Mobile for Development Foundation receives funding from governments and institutions to research impact opportunities, engage on-the-ground in target countries, and provide advocacy expertise to partners. Donor funding is also used to provide direct funding to small and growing enterprises that leverage digital technology, especially mobile, to deliver solutions.

In 2025, the GSMA Innovation Fund continued to be funded by the UK Foreign, Commonwealth and Development Office (FCDO) and the Swedish International Development Cooperation Agency (Sida). Through funding rounds focusing on specific social, economic and environmental themes, the fund backs the growth of innovative solutions that harness digital and emerging technologies to deliver tangible benefits in digital and financial inclusion, and increased resilience against climate and humanitarian challenges.

Between 2015 and October 2025, the GSMA Innovation Fund invested £30.57 million across 167 organisations in LMICs that went on to raise over £702 million in additional funding, equivalent to 25 times the investment made by the Fund's donors. Through the Fund, 19 new business models and/or tech innovations have commercially launched. These include a new AI-powered system (FarmAdvice in Nigeria) that provides real-time, personalised agricultural advice to smallholder farmers in their local languages via a toll-free phone line and AI-powered curriculum development for teachers in Pakistan.

The 2025 GSMA Innovation Fund for Humanitarian Challenges began supporting 10 grantees to help drive innovative solutions that are leveraging mobile and digital technology to address urgent humanitarian issues, such as food insecurity, displacement, and natural hazards, such as floods, earthquakes and typhoons.

And January 2025 saw the announcement of the GSMA Innovation Fund for Impactful AI, to support innovative use cases, partnerships and business models that leverage AI and emerging technologies alongside mobile technologies. The Fund received 625 eligible applications from 40 countries across Africa, Pacific, South and Southeast Asia.

Between 2015 and October 2025, the GSMA Innovation Fund invested in

167 organisations in LMICs that went on to raise over **£702m+**

25 times the investment made by the Fund's donors up to October 2025



Grantee spotlight

Sommalife

In March 2024, Sommalife received a GSMA grant to enhance its proprietary software TreeSyt to digitalise the operations of female smallholder farmers in northern Ghana. TreeSyt digitalises commodity buying, farmer education, and tree care in areas with limited or no internet access. The grant was used to connect smallholder farmers to international markets and train them in sustainable agriculture.

Since partnering with the GSMA, Sommalife has reached over 87,000 farmers (88% female) with training, access to finance, and markets. In October 2025, Sommalife signed a partnership agreement with MTN Mobile Money Limited, and integrated MTN MoMo APIs and launched a payment system. It has also secured agreements with 102 communities for the conservation of parklands.



ATEC

In March 2022, ATEC received a GSMA grant to develop an Android mobile app integrated with its eCook stoves, which use electromagnetic induction to provide clean cooking, and are available on a pay-as-you-go basis. The app shows customers their real-time electricity usage data, payment status and any carbon offset data, enabling them to pay as little as US\$5 a month.

The stove automatically mints Gold Standard-certified carbon credits, which can be sold to ATEC's international corporate partners and on carbon markets. The benefits from the sale of carbon credits are shared with users through subsidised monthly instalments. Since partnering with the GSMA, ATEC has raised \$15.5 million in equity and has received follow-on funding from a variety of funders for research and development, to secure partnerships and to enable carbon credit trading.



Chapter 4.5

DELIVERING IMPACT FOR THE WORLD

The GSMA delivers impact by addressing the world's most pressing societal, economic and environmental challenges. In 2025, efforts at the forefront included reducing digital divides, empowering AI, facilitating climate action, and addressing frauds and scams. Building multi-sector communities and partnering with multilateral organisations are key to large-scale sustainable solutions.

Reducing digital divides

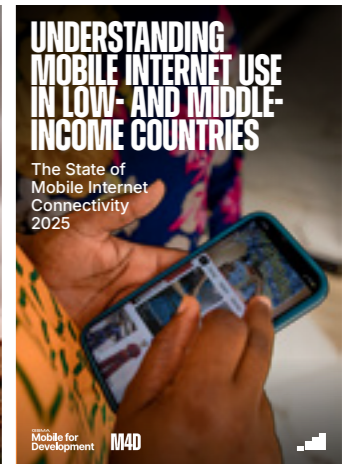
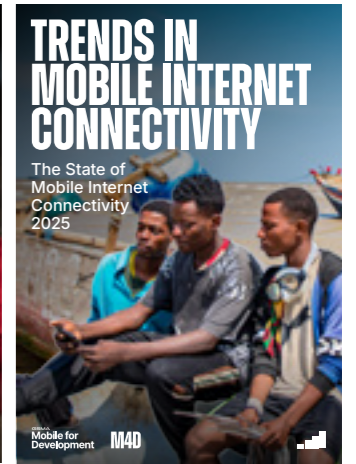
Digital inclusion

Mobile is connecting more people to the internet than ever before, with 58% of the world's population now online through their own device. In LMICs, mobile remains the primary, and often only, way people access the internet, accounting for 84% of broadband connections in 2024. Yet, 38% of the global population live within mobile broadband coverage, but are not using it (the usage gap), while 4% remain uncovered (the coverage gap). Those excluded are more likely to be poor, less educated, rural, women, or persons with disabilities – groups that stand to gain the most from connectivity. For those already aware of the mobile internet, the top reported barriers to adoption continue to be affordability (primarily of handsets) and literacy and digital skills.

The GSMA helps the mobile industry address the usage gap by conducting research and analysis, engaging with governments, intergovernmental organisations and partners, and advocating across multiple channels. In 2025, the GSMA published *The State of Mobile Internet Connectivity 2025* (SOMIC) research as a six-part series for the first time, with each report focusing on a different aspect of mobile internet connectivity:

- [Overview](#)
- [Trends in mobile internet connectivity](#)
- [Network coverage and infrastructure](#)
- [Understanding mobile internet use in LMICs](#)
- [Barriers to mobile internet adoption and use](#)
- [Affordability of internet-enabled handsets and data](#)

Publishing SOMIC as a six-part series ensured engagement over six weeks, spotlighting a different topic with each release and maintaining continuous visibility of the issue. Seven weeks after the first report was published, the SOMIC website reported more than 2,400 total users, 3,700 sessions, 4,500 views and 1,500 downloads, reinforcing the value of this research. SOMIC key findings and related policy reform featured prominently in the GSMA Director General's speeches and panels at the United Nations General Assembly in September.



The GSMA is supporting partners to address key barriers to digital inclusion, including digital skills and handset affordability. The GSMA's *Mobile Internet Skills Training Toolkit (MISTT)* has now been used to train more than 80 million people across more than 40 countries in the basic digital skills needed to use the mobile internet, including a further 5.5 million people between July 2024 and June 2025.

Meanwhile, the GSMA's *2025 Mobile Connectivity Index (MCI)* measures the performance of 173 countries against the key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness, and content and services. The annual publication of the MCI provides an opportunity for ongoing engagement with key advocacy stakeholders and supports government ministries to develop policies and strategies.

An MCI workshop invited by the Malawi Communications Regulatory Authority (MACRA) led directly to the removal of import taxes on smartphones in Malawi in March, after device affordability emerged as the leading barrier to mobile internet adoption. Additionally, the Universal Service Fund, under MACRA, requested the GSMA's support for two digital skills initiatives – one focused on small and medium enterprises and another using digital ambassadors to train people in rural communities. In response, the GSMA conducted a MISTT training-of-trainers session and is providing ongoing advice on the implementation of both campaigns.

58% of the world is using mobile internet on their own phone

Mobile Internet Skills Training Toolkit used to train

80 MILLION people across
40 COUNTRIES with basic digital skills

Connected Women Commitment Initiative has reached over

80 million additional women with mobile internet and/or mobile money services

The mobile gender gap



The GSMA continues to measure the persistent mobile gender gap. *The Mobile Gender Gap Report 2025* shows that while more women are using the mobile internet than ever before, progress in closing the gender gap in mobile internet adoption across LMICs has almost stalled. Women are 14% less likely than men to use the mobile internet (compared with 15% the previous year). The report explores the key barriers to equal mobile ownership and mobile internet use in LMICs and highlights the socio-economic benefits of addressing these barriers for the mobile industry, the economy and society, and for women themselves.

Key messages from the report were shared on high-level platforms, including Women 20 (W20), the Commonwealth Women's Forum, the United Nations General Assembly, and by the Prime Minister of Pakistan on World Telecommunication and Information Society Day. The report generated over 1,000 pieces of media coverage,

including standout interviews with global top tier publications, such as *Semafor* and *Forbes Africa*. Five months after the report was published, the Mobile Gender Gap website reported more than 2,800 total users, 4,100 sessions, 4,300 views and 1,900 downloads.

Through the GSMA Connected Women Commitment initiative, over 50 mobile operators across LMICs have made formal commitments to reduce the gender gap in the customer base of their mobile internet and/or mobile money services. Since 2016, these operators have collectively reached over 80 million additional women with these services, with five million additional women reached between July 2024 and June 2025. So far, 24 mobile operators have extended their commitments beyond 2024.

The GSMA supports key government initiatives to close the mobile gender gap. The Pakistan Telecommunication Authority (PTA) has begun to implement the Pakistan's Digital Gender Inclusion Strategy, which was developed with the GSMA and UNESCO. The GSMA contributed by sharing gender-disaggregated data, best practices and direct policy feedback, and convened mobile operators to participate in consultations. The resulting strategy prioritises affordability, digital literacy, safety and addressing gender norms that impact women's mobile access. The PTA and partners formed six thematic working groups and the GSMA joined the groups on affordability, inclusion, and research and data collection, providing technical and policy advice to steer the strategy to comprehensively address the barriers to women's digital inclusion.

The GSMA continues to engage in, and contribute to, global policy agendas on the gender digital divide. For example, the GSMA adopted a targeted, multipronged approach to successfully ensure that digital gender equality was reflected in the final text of the *Beijing +30 Political Declaration*, which was adopted in March by UN Member States at the 69th Commission on the Status of Women (CSW69). This globally significant document will help guide national gender equality priorities going forward. Bridging the digital gender gap has been identified as one of the six priority areas of the Beijing +30 Action Agenda, helping ensure committed international action.

Humanitarian preparedness, response and recovery

More than 150 climate disasters struck the world in 2024, the hottest year on record, demolishing buildings and decimating livelihoods. The World Meteorological Organisation reported 800,000 people were displaced and made homeless by disasters – the highest yearly number on record. Displacement due to conflict is also at a very high level. In June 2025, the UN Refugee Agency estimated over 117 million people had been forcibly displaced due to persecution, conflict, and violence.

Connectivity and digital technology continue to provide vital innovations and services at scale to address this growing humanitarian challenge. Humanitarian organisations increasingly deliver vital financial assistance through mobile phones to people in hard-to-reach areas. In advance of a disaster, communications through mobile phones can provide advice that can save lives and livelihoods.

The GSMA supports, builds and scales digital innovations and services in partnership with the mobile industry, governments and humanitarian organisations to address this growing global challenge, and has reached more than 18 million people, including 5.5 million in 2025, with improved access to, and use of, life-enhancing mobile services during humanitarian preparedness, response and recovery.

In 2025, the GSMA continued to play a leading role in the UN Early Warnings for All (EW4All) initiative that has an ambition for everyone on earth to be protected by an early warning system. The GSMA makes a pivotal contribution to Pillar 3 of the initiative which is led by the ITU and is focused on "warning dissemination and communication". Within this, the *GSMA convenes the mobile industry, governments and humanitarian organisations to build early warning systems*. To date the GSMA has offered technical assistance in Tanzania, Madagascar, Pakistan, Nepal and the Pacific Islands – to enable cell broadcast technology for early warning dissemination.

To continue building an evidence base on the vital components of partnerships, technology and regulation in effective early warning systems, in 2025 the GSMA published a case study on *Chile*, where mobile operators play an integral role.

The GSMA's work in collaboration with UNHCR – the UN Refugee Agency, the ITU and the Government of Luxembourg continued via the Connectivity for Refugees Initiative, which is working towards connecting 20 million forcibly displaced people and their hosts by 2030. Gaining momentum, this work stimulated increased investment in refugee connectivity in Ethiopia and Chad and informed World Bank connectivity investments in East Africa.

In 2025, the GSMA signed a new partnership with the Swedish International Development Cooperation Agency (Sida) in addition to the programme's longstanding funding from the UK's Foreign, Commonwealth & Development Office (FCDO). The Sida partnership focuses on building vital evidence on how refugees and other affected communities access and use mobile, enabling UNHCR to design and deliver effective and relevant digital humanitarian programming.



Financial inclusion

Mobile money continues to transform access to financial services nearly 25 years after its inception. What began as a means to send and receive funds securely has evolved into a broad ecosystem enabling savings, credit, insurance and payments for billions worldwide. Despite this progress, 1.3 billion people remain financially excluded, underscoring the need for sustained collaboration between industry and regulators.

The GSMA continues to champion the growth and diversification of the mobile money industry through unique research, strategic partnerships to overcome barriers to access and usage, and advocacy and regulatory engagement to advance enabling policy environments.

In April, the GSMA published the 13th edition of the *State of the Industry Report on Mobile Money* – the only global source of comprehensive supply-side data for the sector. The report found:

- Over 2 billion registered mobile money accounts worldwide.
- Annual transaction value surpassing US\$1.68 trillion in 2024, up from US\$1.4 trillion in 2023.
- International money transfers and merchant payments remain the fastest-growing use cases.
- Mobile money now reaches 40% of adults in Sub-Saharan Africa and 37% in Latin America and the Caribbean.

Beyond payments, a growing number of providers are expanding into adjacent financial services, with 44% of respondents to the GSMA's Global Adoption Survey offering credit, 34% savings, and 28% insurance, extending the transformative impact of digital finance on livelihoods and economic resilience.

Seven months after publication, the report had attracted more than 8,100 users, 11,400 sessions, 7,200 views and 3,800 downloads. The launch event video also achieved strong engagement, with over 1,600 views to year end. Media coverage was extensive, with more than 30 articles published in the week following the launch – including features in *Forbes Africa* and *Fintech Finance News*. A *Devex* article alone reached nearly 400,000 impressions and over 9,300 clicks.

Another GSMA research publication, *How Interoperability Models Impact Financial Inclusion and Competition*, provided timely evidence on how different interoperability approaches influence innovation, market dynamics, and access to



digital financial services. A headline finding is that if countries had implemented market-led interoperability when the market was sufficiently mature, there could have been an additional 30–70 million active 90-day accounts of mobile money in 2023.

The GSMA's Mobile Money Certification (MMC) continued to set the global standard for consumer protection and operational excellence. With over 300 rigorous criteria, the certification strengthens consumer trust and regulatory confidence. To amplify awareness, the team launched a new landing website and promotional video featuring certified partners and new Advisory Board members, highlighting the value of MMC.

2025 saw significant advocacy achievements. At the global level, the GSMA's submissions – alongside other partners – contributed to revisions of FATF Recommendation 16, reducing Know-Your-Customer (KYC) requirements for cross-border transfers and easing compliance for mobile money providers. And the GSMA held a technical workshop, attended by more than 80 central bank representatives, on regulating for the future of mobile money in Africa.

Addressing global challenges



Climate action

Climate action continues to be a key priority for the mobile industry. The GSMA Climate Action Taskforce now covers 80% of global mobile connections, through 79 mobile operator members in over 150 countries and territories around the world.

In June, the GSMA released its fifth annual update report *Mobile Net Zero: State of the Industry on Climate Action 2025*, showing that mobile operators have cut their emissions by 8% since 2019, despite surging demand for connectivity and data. Operators in Greater China, which account for half of global operator emissions, reduced emissions for the first time in 2024. The report generated more than 1,500 pieces of media coverage.

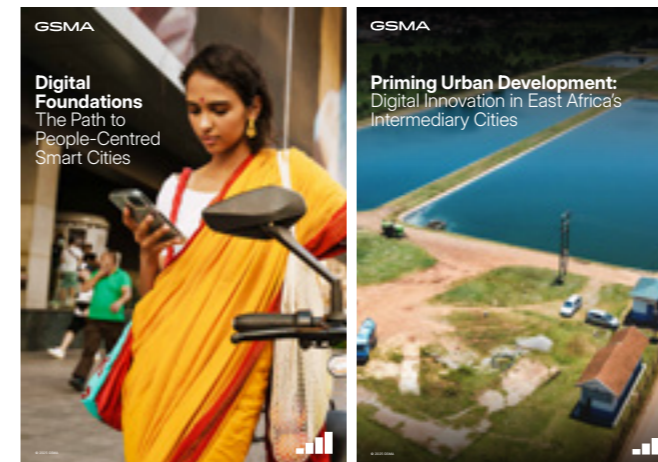
As the mobile industry moves decisively from pledges to progress, the GSMA published the *Climate Transition Planning Guidance for Telecommunication Companies*, a framework for mobile operators to develop their own transition plans. Developed with the ITU and Carbon Trust, the guidance aligns with international sustainability reporting standards and aims to enhance the quality and consistency of transition planning across the telecom sector globally. Fifteen mobile operators have already committed to publish their Climate Transition Plan in alignment with the GSMA guidance.

Access to renewable energy sources continues to be a challenge for many mobile operators, particularly in Africa and Asia. In Africa, the GSMA facilitated dialogue between operators, the World Bank and third parties in Nigeria to share data and insights to leverage energy access financing to improve operator access to renewables. The GSMA also initiated policy advocacy efforts in Asia Pacific to support renewable energy access for regional operators and the industry's supply chain.

Supply chain emissions remain the biggest challenge for the industry. To help address this, the GSMA launched the *Scope 3 Assessment Tool*, aimed at helping mobile operators to calculate their supply chain emissions for common suppliers and key products. Twenty mobile operators have agreed to trial the tool. Improved measurement and a common source of knowledge for the industry is a first step towards targeted action to reduce these emissions.

The next step is engaging with suppliers, which is supported by an MoU between the GSMA and the Joint Alliance for CSR (JAC) initiative. The GSMA also continues to highlight how circular business models can reduce supply chain emissions, presenting the business case for eco-design and longer device lifetimes, including more refurbishment and repair, in the *Rethinking Mobile Phones report*, which will inform the further development of the Scope 3 Assessment Tool.

Sustainable cities



In June, the GSMA published *Digital Foundations: The Path to People-centred Smart Cities*, highlighting how mobile-enabled solutions are transforming essential urban services across energy, water, waste and transport. The report has been downloaded 200 times. The GSMA also published *Priming Urban Development: Digital Innovation in East Africa's Intermediary Cities*, with case studies from Kenya, Uganda and Rwanda, which generated 87 downloads.

A collaboration between the GSMA and UN-Habitat helped to shape the *International Guidelines on People-centred Smart Cities*, setting out core principles and enabling conditions. The Guidelines were presented and adopted at the resumed second session of the UN-Habitat Assembly and featured in UN-Habitat's World Smart Cities Outlook.

Climate finance

The GSMA published an online *VCM Startup Guide* which explains market architecture, integrity standards and routes to accreditation to enable early-stage teams to test commercial feasibility before investing. The guide, which has been downloaded more than 200 times, was used to support alumni from the GSMA *Innovation Fund for Climate Resilience and Adaptation*.

In 2025, the GSMA also supported three alumni from the GSMA Innovation Fund for Digital Urban Services with follow-on investment for accelerated growth. ATEC, Diyalo Technologies and Freetown Waste Transformers were awarded a grant to scale mobile-enabled solutions for essential urban services, receiving tailored support to strengthen their commercial models and deepen impact in intermediary cities.

In late 2024, the GSMA analysed how mobile and digital solutions can advance a sustainable blue economy in LMICs. *The Blue Tech Heatmap* assessed 148 innovations, with about 40% in fisheries and aquaculture and a fifth in blue carbon and ecosystem resilience. The findings point to the need for regional data coordination, de-risked investment and stable policy, especially for small island developing states. In Indonesia, the GSMA's ClimateTech programme partnered with Indosat Ooredoo Hutchison to explore how IoT for shrimp farming can impact productivity and mangrove conservation.

Agriculture

The GSMA AgriTech Accelerator, which ran from June 2023 to October 2025, supported the growth of innovative, revenue-generating digital agriculture solutions to improve farmers' livelihoods, financial inclusion and climate resilience through digital innovation. Through tailored technical assistance, the Accelerator helped nine agritech across Africa and Asia to refine their products, engage users, become investment ready, and measure their impact.

The GSMA published a *final learnings report* and user experience (UX) design guidebook for the mobile industry.

335,000+

new farmers registered by cohort members



89%

of new farmers had better access to digital agricultural services

100,000+

new female farmers had better access to digital agricultural services

20+

product iteration workshops (PIW) were held, leading to:



3

The development and launch of 3 new agritech solutions

7

Major improvements to 7 existing services, optimising user registration, platform design and features

Environmental, social and governance (ESG)

In 2024, 24 mobile operators submitted data to GSMA Intelligence as part of the ESG Metrics for Mobile benchmarking process. Ten of these operators also publicly reported against the metrics. Based on this data, in 2025, the GSMA published *ESG Metrics for Mobile Benchmarking 2024*, providing a comprehensive analysis of how mobile operators worldwide are adopting and disclosing ESG metrics to drive sustainability and business value.

At the GSMA Sustainability Leaders Roundtable at MWC25 Barcelona, 10 senior executives from leading mobile operators fostered strategic alignment across the key categories of the ESG Metrics for Mobile, prompting further engagement on digital inclusion. In October, the GSMA published *The Business Imperative for Digital Inclusion: Reporting and Engagement Guide*, which positions digital inclusion as a strategic asset through shared definitions, core measurement approaches, and principles for meaningful stakeholder engagement.

As biodiversity and nature continue to decline, the GSMA worked with more than 40 mobile operators on a nature impact assessment guidance for the mobile sector. In January, the GSMA published the *Nature Guidance for Mobile Industry* report which addresses both the 'why' and the 'how' of nature assessments for mobile operators. Downloaded 253 times, this report has helped operators build capacity in this important area and will provide a framework on how to report on material issues.

Ten mobile operators and the European Financial Reporting Advisory Group (EFRAG) and the European Commission attended a workshop on the EU's Corporate Sustainability Reporting Directive (CSRD) run by the GSMA in Brussels. This led to the inclusion of GSMA EU members as a key stakeholder group for the EFRAG CSRD review process. The *ESG Metrics for Mobile* whitepaper and the GSMA's *Nature Guidance for Mobile Industry* report were both considered as input documents for the recent CSRD Omnibus package revisions, with EFRAG releasing its latest draft December 2025.

Child protection

Through 2025, the GSMA continued with efforts to combat digital child sexual exploitation and welcomed Tele2 and Safaricom as the latest members to join the GSMA Mobile Alliance to Combat Digital Child Sexual Exploitation.

The GSMA Ministerial Programme at MWC25 Barcelona included sessions where prominent youth advocates, such as Brittany Loor, shared lived experiences and urged policymakers to listen to young people when designing digital policies. Also discussed at the Ministerial Programme was the urgency needed to increase efforts to protect children on the African continent. Jemima Kasongo, a 19-year-old youth advocate from the Democratic Republic of Congo, gave a powerful call to action to key stakeholders attending a high-level roundtable. Building on these discussions, in June the GSMA published the whitepaper *Enhancing Child Online Protection in Sub-Saharan Africa*, outlining key recommendations to guide governments, regulators, industry, civil society, and youth stakeholders as they work together to create a safer digital environment for children.

This publication led directly to MWC25 Kigali in October, where the GSMA and UNICEF launched a multi-stakeholder Africa Taskforce on Child Online Protection (COP) to lead, coordinate and advance child online protection efforts across Africa, while helping to build national and regional capacity to keep children safe online. Members include mobile operators, international NGOs, Interpol and youth representatives. Young people who contributed to the GSMA's whitepaper's consultations continue to play an active role through the Taskforce, ensuring that the perspectives of Africa's next generation remain central to this work.

Fighting fraud and scams

In February, the GSMA published *Fraud and Scams: Staying Safe in the Mobile World*, exploring the use of social engineering and impersonation to commit fraud and scams, and the impact on consumers and wider society, often resulting in the loss of trust in the digital space. The GSMA's Anti-Scam Use Case Library showcases how mobile operators and partners are innovating and collaborating across the mobile ecosystem to address fraud and scams.

This work led to the GSMA contributing to the ITU's Telecommunication Development Sector Study Group on the industry's approach to tackling

SMS phishing and participating in the European Independent Regulators Group training workshop, which both led to the global perspective of *The Impact of Cybersecurity Regulation on Mobile Operators*, featuring in-depth interviews with 14 mobile operators.

In Asia Pacific specifically, the GSMA played a key role in efforts to combat digital fraud and scams through its APAC Cross-Sector Anti-Scam Taskforce (ACAST), and brought together mobile operators, digital platforms, and regulators to develop effective countermeasures. In August, the GSMA hosted a closed-door roundtable with India's mobile operators, Google, Meta, TRAI, and DoT, and presented its work on fraud, spam and scams at the Joint Committee of Regulators (JCoR), which includes the Reserve Bank of India, MeitY, and other sectoral regulators. These engagements are strengthening the case for a secure, interoperable, and innovation-friendly telecom ecosystem in India.

ACAST amplified its impact by uniting 35 organisations from 17 countries across the region, to drive coordinated action against digital fraud and scams, and throughout 2025, ACAST's advocacy – including a widely cited call for action on SMS blasters – helped spotlight scam risks to governments and consumers, catalysing new countermeasures and awareness campaigns across Asia Pacific.

In March, the GSMA Board approved the United Against Scams (UAS) initiative to deliver a coordinated, industry-wide response to scams targeting consumers. The initiative then moved rapidly from concept to delivery, aligning member expertise, agreeing a baseline set of controls called GSMA Scam Safeguards, and growing a pipeline of innovation projects and implementation tools. By year end, around 70% of baseline safeguards were in place or committed.

In October, the GSMA Board moved the initiative into a public leadership phase with a targeted global advocacy campaign at MWC Barcelona 2026, focused on policymakers and legislators rather than consumers, to position the industry as a proactive and responsible leader and to emphasise that tackling scams is a shared responsibility across the full ecosystem, not solely mobile operators. Messaging will be member-led, reflecting member priorities and sensitivities, and will not disclose individual operator solutions or detailed technical controls. Board members committed to lead by example through implementation of the GSMA Scam Safeguards.

Building multi-sector communities

Connected Manufacturing and Production Fintech and Commerce

In 2025, the industrial sector advanced from early adoption of 5G to “early majority”, driven by private 5G networks and Industry 4.0 applications. The GSMA’s two-part paper on network APIs, developed with 13 organisations, achieved nearly 200 downloads, highlighting growing interest in this transformative technology.

The GSMA convened over 1,000 attendees to Manufacturing Summits in MWC25 Barcelona and MWC25 Shanghai, where 32 organisations demonstrated how mobile solutions are solving resource challenges and delivering measurable value. Visitors to the GSMA Pavillion had the opportunity to engage with hands-on manufacturing demonstrations, including a 5G-enabled torque wrench for Airbus and AI-powered solutions addressing factory floor skills gaps.

The GSMA expanded its reach with speaker engagements at Hannover Messe in Germany, the Smart Factory Summit in Switzerland, and the NextGen Manufacturing Summit Africa in Morocco. The quarterly GSMA Manufacturing and Production forum meetings, including hybrid sessions at the GSMA London office and Brainport 5G Smart Factory lab in Eindhoven, enabled high-quality collaboration among 35 participants from 23 organisations and remote engagement from a further 33 organisations. The new Industrial Knowledge Network signed up 48 people from 31 organisations with the focus on amplifying the message of how mobile technology is delivering industrial impact.

These activities underscore the GSMA’s role in accelerating industrial transformation, fostering collaboration, and demonstrating the tangible impact of mobile technology and network APIs on manufacturing worldwide.



The Connected Fintech and Commerce Community (CFCC) offers a platform to explore trends and opportunities, and share insights and case studies, and key use cases. In 2025, it hosted four online forums featuring speakers from across the world bringing local, regional and international perspectives across a wide range of fintech and commerce related topics.

The CFCC hosted a full-day Fintech and Commerce Summit at MWC25 Barcelona and MWC25 Kigali, providing platforms for members and partners to explore the latest trends and showcase their solutions. The summits covered topics including AI, mobile commerce (payments, super apps, interoperability, conversational commerce), mobile operator fintech strategies, fraud and scams, strategic collaboration, lending powered by alternate data, insurtech and network APIs, and were extremely well attended.

The GSMA joined the Global Anti Scam Alliance, supporting summits in London and Singapore to collaborate with key stakeholders, sharing and exploring the latest insights on global scam threats and solutions, such as the Open Gateway Scam Signal API.

The CFCC supports the broader mobile ecosystem’s efforts to fight back against scams, in conjunction with mobile operators, SABRIC (a South African not-for-profit agency), FICO (an analytics software company) and JT (a UK government-owned full-service global connectivity and business enterprise provider). MTN Chenosis has launched the Scam Signal API making South Africa the second country to go live.



Smart Mobility

Mobile connectivity is becoming the foundation of future smart mobility, enabling enhanced passenger experiences and supporting full autonomy on land and in the air. In 2025, the GSMA Smart Mobility Community continued to help stakeholders understand operator capabilities, address challenges, and collaborate on solutions as one ecosystem. Member companies’ participation grew by 15% in 2025, reflecting increasing awareness and the growing importance of collaboration.

The Drone Interest Group and Aerial Connectivity initiative advanced air mobility by deepening engagement with drone operators and first responders, demonstrating how mobile connectivity enhances safety and operational efficiency while identifying remaining gaps. The GSMA also joined the ICAO Advanced Air Mobility Study Group to ensure mobile networks are considered in international aviation standards for the first time.

The GSMA’s three reports on key regulatory developments for the connected automotive and UAV sectors, achieved more than 250 downloads. The reports focus on connectivity requirements and provide strategic guidance for connectivity service providers and OEMs. One report explores China’s rapidly growing C-V2X market and the advancement of 5G automotive applications.

Regulatory momentum strengthened significantly in 2025. The U.S. Department of Transportation endorsed using existing mobile networks to support the safe integration of unmanned aircraft systems (UAS) and the FAA published its proposed rule for beyond visual line of sight operations, incorporating mobile networks into aviation regulations for the first time.

Following the launch of commercial drone services using cellular connectivity in 2024, the focus in 2025 was on assessing capabilities and driving market evolution, as mobile operators refine and develop APIs through the Drone Interest Group to accelerate implementation and unlock new business opportunities.

The Smart Mobility Summit was held at four MWC events, featuring 63 speakers and attracting 1,512 attendees from across the automotive, maritime, UAS, and aviation sectors. In parallel, the GSMA launched a podcast series on mobility innovation, reaching 1,500 listeners.

Partnering with multilateral organisations

In 2025, the GSMA boosted its engagement with leading international organisations to influence global technology governance and digital development. On behalf of the mobile industry, the GSMA prioritised engagement with the ITU, G20, OECD, World Bank and other UN agencies.

Digital divide advocacy

The GSMA ran an advocacy campaign to advance an evidence-based understanding of the digital divide (the gap between people who use connectivity services and those who do not) across the global ICT policy and regulatory community. The campaign sought to address a narrative propagated by parts of the satellite industry, which claims that advances in space-based communications will effectively close the digital divide (including the usage gap) and enable universal connectivity. This campaign resulted in regional regulatory bodies, such as CEPT, CITELE, APT, ATU, RCC and LAS, adopting the language and definitions that the GSMA has been advocating for.

WTDC-25

At the World Telecommunication Development Conference (WTDC), the GSMA successfully advocated for the inclusion of language recognising the magnitude of the usage gap and calling for international action to address it. A key result, the usage gap was recognised and included in the High Level Baku Declaration and WTDC Resolution 37 on "Bridging the Digital Divide". The GSMA campaign resulted in 5 regional regulatory bodies, including CEPT, CITELE, APT, ATU, RCC, calling for action on the usage gap at the ITU-WTDC conference.

In the lead up to WTDC, the GSMA attended 16 in-person regional preparatory meetings, 30+ virtual working group meetings, drafting sessions, bilateral and multilateral discussions, and 3 regional workshops for regulators and ITU delegations.

Other key successes included the adoption of a new ITU-D study group question on device availability and affordability and countering language which represented a risk to the mobile industry across resolutions looking into child online protection, assessment and measurement of human exposure to EMF, cybersecurity, disaster preparedness, network deployment, spectrum management and others.

G20

The GSMA engaged closely with the G20 process, hosted by the Government of South

Africa in November, particularly through the Business 20 (B20) and Women 20 (W20) groups. The GSMA's participation in the B20 led to the adoption of a policy paper that called for action on the "sizeable usage gap", citing GSMA data, and discussing the issue throughout the connectivity section of the paper. It also referenced the issue of device affordability, using GSMA data, and called for action to "scale access to connected mobile devices", including by lowering or removing import duties and other fiscal burdens.

The GSMA co-chaired the EU delegation to the W20 and the W20 Taskforce on Bridging the Digital Divide, STEAM and Education. W20 policy outputs cite GSMA data on the economic benefits from closing the usage gap across G20 member states, as well as the mobile gender gap across low- and middle-income countries. The call for action section of the W20 Communique highlights the importance of public-private partnerships in addressing key barriers to Internet adoption and stressed the urgency of tackling device affordability and lack of digital skills and literacy.

BRICS

The BRICS Summit took place in Brazil this year with the GSMA providing input to the BRICS Business Council, which adopted a Recommendation recognising that "Bridging the digital divide also requires rolling-out broad digital literacy and device affordability programmes to address the digital usage gap, as the majority of individuals who remain offline live in areas with connectivity, but simply do not use it".

UN World Summit on the Information Society (WSIS)

The GSMA engaged in the WSIS Review process including through the International Chamber of Commerce (ICC). It submitted written feedback and proposed edits which explicitly name the usage gap, highlighting the scale of the challenge vis-à-vis the coverage gap, and pushing for greater action on barriers to internet adoption and use.

UN General Assembly 2025

A GSMA delegation, led by Director General Vivek Badrinath, represented the mobile industry at the 80th United Nations General Assembly (UNGA) in New York City. The GSMA spoke publicly at major summits and various side events focusing on the benefits of mobile internet connectivity and the ongoing need for collaboration between public and private sectors to continue progress in closing both the investment and usage gaps. The GSMA hosted a high-level closed door Partners for Impact dinner

gathering 15 government and industry leaders, and held bilateral meetings including with ICT ministers, the Tech Ambassador of Denmark, and leaders from the UN Office for Digital and Emerging Technologies, the World Bank, ITU and UNECA. The inaugural "Digital Ambassadors Forum" was also jointly launched by GSMA, Mastercard, AT&T and Oracle during a full day event bringing together key public and private decision makers to discuss the future of digital cooperation.

EQUALS

As part of its contribution to EQUALS Global Partnership for Gender Equality in the Digital Age, the GSMA developed the EQUALS Gender Inclusivity Index: an assessment tool for companies and organisations to evaluate the state and progress of gender transformation in their internal and external operations and activities. A pilot of the Index was carried out by a targeted GSMA Focus Group, which included 16 mobile operators. This culminated in the EQUALS Gender Inclusivity Index Key Findings published in December 2025.

The EQUALS Her Digital Skills initiative, co-led by the GSMA, received renewed financial endorsements by Verizon in 2025. To date, the initiative has directly and indirectly benefitted over 350,000 women across 80 countries.

UNESCO

As part of the UNESCO AI Ethics Global Forum, the GSMA joined seven other companies, including Mastercard, Microsoft, Salesforce and Telefónica, to sign a commitment to implement AI ethics in business.

International tech governance

The GSMA engages in global policymaking and standardisation processes to ensure that the guidelines, recommendations and specifications they produce are aligned with industry-recognised best practices.

OECD

GSMA engagement at the OECD through the Business at OECD group, was significantly intensified in 2025. Mechanisms for close collaboration with mobile operators were set up, leading to effective advocacy across several priority workstreams. For example, the GSMA influenced the positive revision of basket methodologies determining OECD broadband pricing statistics, which are a critical reference for regulators across countries. The OECD methodologies now include flanker brands and baskets that are better aligned to market realities.

ITU-T

The GSMA is working across study groups in the ITU standardisation sector to ensure that the recommendations they produce do not overlap or conflict with work carried out at industry-led standards organisations or undermine internal GSMA standardisation activities and services (such as the IMEI registry).



Empowering AI

The GSMA significantly advanced its 'Empowering Telco for AI' agenda, solidifying the mobile industry's pivotal role in building a smarter, more connected future. The new Mobile AI Community has brought together over 50 members to collaboratively define AI architectures, and the AI Observatory began monitoring AI traffic growth, underscoring the GSMA's commitment to understanding and shaping the evolving technological landscape. The goal is to ensure that as AI transforms the industry, it does so responsibly and with collective vision.

The GSMA Open Telco Benchmarks initiative was a core focus, creating an industry framework for evaluating AI models in telecoms. In addition, and in partnership with Khalifa University, the GSMA developed TelecomGPT, an advanced open-source telco-first AI model, and a knowledge graph focused on 3GPP, available to members. This work aims to increase access to telecom-specific models to lower the barrier for mobile operator adoption.

Working with both Nvidia and Dell Technologies, and a series of ecosystem partners, the GSMA launched the Distributed Inference programme to build industry evidence and tools to demonstrate the significant value and telco opportunities of shifting the runtime execution of AI models (inference) from centralised data centres to the edge and on-device across the end-to-end network. This approach promises to enable new, highly efficient, and localised services.

The GSMA advanced its commitment to inclusive AI innovation through a groundbreaking collaboration with Dialog in Sri Lanka. This initiative explores how large language models can empower local entrepreneurs and small businesses by improving access to digital tools, training, and market insights in local languages.

Meanwhile, the wider EmergingTech programme, delivered by GSMA Mobile for Development and funded by the UK Foreign, Commonwealth & Development Office (FCDO), is aiming to unlock the potential of AI and emerging technologies for the underserved in low- and middle- income countries.

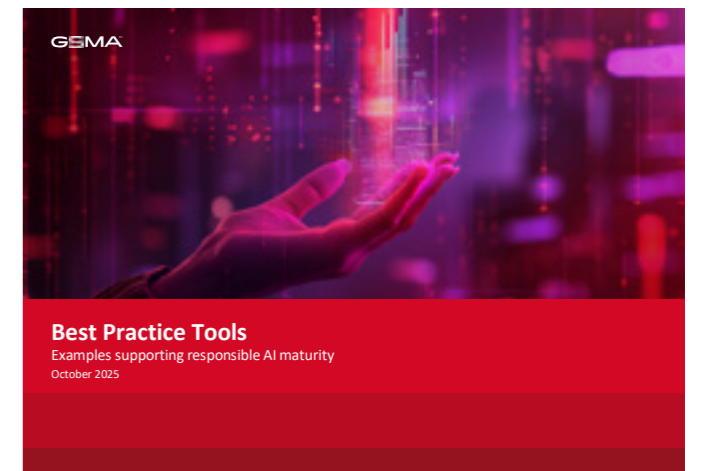
At MWC25 Kigali, the GSMA – together with Airtel, the African Population for Health Research Center, Awarri, Axian Telecom, Cassava Technologies, Ethio Telecom, Masakhane African Languages Hub, Lelapa AI, MTN, Orange, Pawa AI, Qhala, the World Sandbox Alliance and Vodacom – announced a continent-wide collaboration to strengthen Africa's AI ecosystem by developing inclusive African AI language models. The initiative aims to crowd in resources and expertise to address gaps in data, compute, talent and policy, ensuring African languages, cultures and knowledge are fully represented in the global digital future.



Responsible AI

It is crucial that AI is designed, developed and deployed in a responsible way. To that end, 24 operators have now adopted the GSMA's Responsible AI Maturity Roadmap, which provides clear steps for implementing responsible AI according to an organisation's level of maturity. Meanwhile, the updated GSMA Best Practice Guide on AI Maturity provides mobile operators with a clear, actionable framework to assess and advance their organisational readiness for responsible AI deployment.

The GSMA's Building Trust in Telecom AI initiative brought together leading experts to share insights on transparency, accountability, and red-teaming practices, reinforcing the mobile industry's role in ensuring trustworthy AI systems. To further support members on their responsible AI journey, the GSMA has introduced a Responsible AI Self-Assessment tool, enabling mobile operators to evaluate their current maturity level and identify practical next steps for improvement.



Chapter 5

LOOKING AHEAD



Geopolitical tensions and economic complexity will continue in 2026. In this environment, the private sector, and the mobile industry in particular, will need to stay adaptive and resourceful, to invest and provide the essential connectivity layer for economies and governments around the world.

The GSMA's significant internal investments in 2025 further strengthened its robust and flexible organisational structure and its agility to react to unexpected global events and market forces.

Against a changing global backdrop, the GSMA will continue to help its members unlock the full value of new tech advances, including AI, through the increased capabilities of mobile networks.

In 2026, the GSMA will maintain a sharp focus on opening new revenue opportunities for the industry and advancing the agenda on online safety and trust – both areas that are becoming central to sustainable digital growth.

Closing the digital divide will remain a core strategic priority, in particular handset affordability. In an increasingly digital world, coordinated action to bridge this gap has never been more urgent.

In the face of the challenges experienced in 2025, mobile connectivity continues to play a foundational role. By enabling governments, industries, communities, people, and devices to access real-time information and guidance, mobile networks remain indispensable to resilience, decision-making, and inclusive growth.

The GSMA will continue to convene, advocate and drive collaboration across the ecosystem, ensuring the industry's voice is heard, its interests are advanced, and its impact is unmistakable.

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