

Vydens: Industry Statement of Requirements for Commercial Availability of Location Network APIs in Physical Retail

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Context

Vydens appeals to Mobile Network Operators (MNOs) globally to make commercially available the location Network APIs already standardised via the CAMARA Project. The critical priority is Geofencing Subscriptions, followed by Device Location Verification and Most Frequent Location (MFL).

The physical retail sector faces significant challenges in delivering relevant and personalised experiences to consumers. The traditional marketing communication model generic broadcasting without location context or real behavior results in very low conversion rates, wasted media investment, and consumer frustration from receiving irrelevant promotions.

Retailers struggle with the fundamental inability to know who is where and when. This operational blindness prevents activation of promotions when the customer is near or inside the store, prioritisation of products with critical stock or high margins, and real ROI measurement between marketing investment and physical store conversion.

The delivery of advanced functionalities especially real-time geofencing with automatic triggers on entry/exit of configurable zones is being hindered by the absence of commercial availability of these APIs on MNO networks, despite being technically standardised and functional in test environments. Geofencing is the most demanded use case by retailers because it enables automatic campaign activation at the exact moment the consumer is physically near or inside the store, maximising relevance and conversion.

Additionally, presence detection without GPS or installed app (Device Location Verification) and mobility profiles for intelligent segmentation (Most Frequent Location) complete the set of capabilities needed for truly connected retail. All of this impacts both the end customer experience and the retailer's ability to innovate and monetize new services.

The severity and urgency of these challenges cannot be underestimated. As physical retail becomes increasingly digital and dependent on intelligent connectivity for its operation and competitive differentiation, the lack of commercial availability of location Network APIs especially Geofencing is preventing the industry from realising the full potential of connected retail. Without a fundamental shift toward commercially available network-aware and intelligent connectivity, the promise of truly contextualised and responsive retail will remain unrealised.

While this Statement focuses on physical retail, the same demand pattern applies across adjacent sectors such as aviation, automotive, and smart cities, where location-aware, network-verified context is becoming foundational to service delivery.

It is imperative that the telecommunications industry addresses these critical challenges by urgently making commercially available for consumption the location Network APIs already standardised via the CAMARA Project, with maximum priority for Geofencing Subscriptions.

Market Opportunity

According to multiple industry sources, the global physical retail market is valued at approximately \$30-35 trillion in 2025 and still represents around 80% of total global retail commerce, even after significant e-commerce growth during the pandemic.

Personalisation has become a critical revenue differentiator. Companies leading in personalisation generate 40% more revenue than average-growth competitors, and 56% of consumers become repeat buyers after a personalised experience.

The specific market for location-based marketing and proximity marketing is projected to grow from \$37-131 billion in 2025 to \$303-992 billion by 2032-2035, with CAGR between 13-31% according to multiple market research sources¹. This growth is driven by increasing

¹ 1. Global physical retail market size (~\$30-35 trillion; ~80% of total retail commerce):

— eMarketer / Statista, Global Retail Market data (<https://www.statista.com/topics/5922/retail-market-worldwide/>)

— Capital One Shopping Research, Retail Statistics (<https://capitaloneshopping.com/research/retail-statistics/>)

2. Companies leading in personalisation generate 40% more revenue:

— McKinsey & Company, "Next in Personalization 2021" — "The value of getting personalization right—or wrong—is multiplying" (<https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/the-value-of-getting-personalization-right-or-wrong-is-multiplying>)

3. 56% of consumers become repeat buyers after a personalised experience:

— Twilio Segment, "State of Personalization Report 2023" (<https://www.twilio.com/en-us/press/releases/sopr-2023>)

4. Location-based/proximity marketing market (\$37-131B in 2025 → \$303-992B by 2032-2035; CAGR 13-31%):

— Market Research Future, Proximity Marketing Market (\$131.03B in 2025 → \$992.18B by 2035) (<https://www.marketresearchfuture.com/reports/proximity-marketing-market-3909>)

— Persistence Market Research, Proximity Marketing Market (\$303.5B by 2032) (<https://www.persistencemarketresearch.com/market-research/proximity-marketing-market.asp>)

— Business Research Insights, Proximity Marketing Market (13.1% CAGR) (<https://www.businessresearchinsights.com/market-reports/proximity-market-105829>)

— UnivDatos, Proximity Marketing Market (31.07% CAGR) (<https://univdatos.com/reports/proximity-marketing-market>)

— Fortune Business Insights, Location Based Marketing Market (\$55.79B in 2023 → \$232.7B by 2032) (<https://www.businessresearchinsights.com/market-reports/location-based-marketing-market-102271>)

mobile device adoption, 5G network expansion enabling low-latency use cases, and growing demand for contextualised and immediate shopping experiences.

Our commercial conversations with leading retail groups in Portugal, Spain, and Brazil — including supermarket chains, fashion, restaurants, and foodservice — confirm a critical shift in purchasing behavior. Retailers are no longer looking for basic telematics or generic broadcasting. They are actively demanding truly intelligent connected services based on real physical presence, context-adaptable communication, monetizable solutions generating measurable and direct ROI, and platforms with integration capability to existing technology stack.

In Brazil, three named organisations are interested in the Network APIs technology: **Savegnago Supermercados**, one of Brazil's largest food retail chains, with more than 60 supermarkets across the interior of the State of São Paulo; **Fast Shop**, a leading Brazilian premium consumer electronics and home appliances retailer, with around 70 physical stores across the country; and **Multiplan**, one of Brazil's largest shopping centre operators, with 20 shopping centres. Together, these organisations cover three complementary verticals — food retail, specialty retail and shopping centres — reinforcing the breadth of industry demand represented in this SoR.

This is not a long-term aspiration. It is a current pain point with allocated budget for the coming years.

The industry needs solutions that scale globally, and this can only be achieved through standardisation, as these services need to work consistently and reliably wherever the consumer is in the world. Retailers, MNOs, developers, and other stakeholders need to create these solutions adhering to globally recognised standards. In this regard, Network APIs need to comply with GSMA Open Gateway principles. Doing so will be fundamental to enabling faster global rollouts, reducing interoperability challenges, and minimising cost and integration complexities.

Location Network APIs place MNOs in the market previously dominated by big techs with unbeatable differentiators: network-verified location, real-time context, true personalisation, and privacy by design. This is a historic opportunity for mobile operators to position themselves as a credible and differentiated alternative in the digital advertising market, leveraging unique assets that no big tech possesses — the mobile network and the direct relationship with the consumer.

Current State of Play

Vydens has a 100% functional and operational solution of AI agentic platform for physical retail, built natively on GSMA Open Gateway and CAMARA Network APIs.

The platform delivers AI agentic with dedicated fine-tuning per client, native integration with ERP, CRM and POS, 1:1 multi-channel message generation, ROI tracking through unique coupons validated at checkout, and GDPR-compliant Retail Media framework.

Vydens validated the technical integration in sandbox environments of Telefónica, NOS, Vivo, and Orange, confirming that the platform is Network API ready and CAMARA-compliant. Successful technical tests in sandbox environments confirmed functional integration with Geofencing Subscriptions API, Device Location Verification API, and Most Frequent Location API.

The technology works. The integration works. The performance works in sandbox environment. What is missing is commercial availability for enterprise clients to consume these APIs in production.

The solution has already been presented to several retailers in Portugal, Spain, and Brazil, and all are delighted with the technology and the possibilities it unlocks. The enthusiasm is unanimous, but commercial availability of Network APIs is missing to at least start proofs of concept. There is documented demand, there is allocated budget, there is willingness to move forward — only missing is for MNOs to commercially make available the APIs that are already technically ready and standardised.

Although the primary focus is physical retail, the platform architecture supports any vertical benefiting from ultra-personalized communication based on location and verified context. Connectivity based on location Network APIs is not a luxury — it is basic infrastructure for any physical retail operation wanting to compete in the 21st century.

Use Cases Mapped to APIs

Use Case	Network API
Automatic campaign activation when consumer enters the store's geographic zone (configurable radius by retailer)	Geofencing Subscriptions
Perishable goods management — proximity trigger combined with critical stock and high margin	Geofencing Subscriptions
Retail Media — suppliers activate proximity campaigns with 100% anonymized data	Geofencing Subscriptions + MFL
Consumer presence detection in-store without GPS and without installed app	Device Location Verification
Drive-to-store with unique trackable coupon and measurable ROI	Geofencing Subscriptions + Device Location Verification
Segmentation by mobility profile (Loyal Local, Dual Regular, Mobile Hub, Weak Local, Orphan)	Most Frequent Location

Use Case	Network API
Send timing optimization based on real presence pattern (day and hour)	Most Frequent Location

API Functional Requirements

Geofencing Subscriptions (Priority 1)

- Geographic radius configurable by retailer (e.g., 500m, 1km, 2km)
- Real-time entry and exit zone monitoring
- Automatic campaign trigger on zone crossing
- Support for multiple simultaneous zones per retailer (multiple stores)
- Event-driven notification (push, not polling)
- API accessible via secure, standardised interface (GSMA Open Gateway spec)

Device Location Verification (Priority 2)

- Presence detection via operator network — no GPS, no installed app
- Fraud-proof verification (network-verified data, not self-reported)
- Boolean or proximity response (inside/outside zone)
- Works on any mobile device with active SIM

Most Frequent Location (MFL)

- Standardised mobility profiles: Loyal Local, Dual Regular, Mobile Hub, Weak Local, Orphan
 - Visit frequency per configurable period
 - Presence patterns by day and hour
 - Aggregated and anonymised data (no individual trajectories)
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Collaboration with GSMA

Vydens is working with GSMA with the purpose of ensuring that its Network API solutions are standardized according to the GSMA Open Gateway framework, including the use of industry standard CAMARA and TM Forum APIs. With GSMA support, the goal is to collaborate with MNOs globally in an open and non-discriminatory manner. This

collaboration will place Vydens in a strong position to scale its platform as quickly as possible, minimising costs, reducing interoperability challenges and integration complexities for operators and retailers.

Opportunities for MNOs

Given the documented industry demand and strong growth drivers, we appeal to MNOs to collaborate with us in creating globally scalable and repeatable solutions leveraging Network APIs. We specifically identify at least four demand areas where MNOs can collaborate with us:

1. **Prioritise API Exposure:** Actively expose and commercialise existing and mature GSMA Open Gateway APIs through their networks for enterprise consumption in production. Critical priority: Geofencing Subscriptions — the most demanded API by retailers because it enables automatic campaign activation based on entry/exit of configurable geographic zones, maximising relevance and ROI. Followed by Device Location Verification and Most Frequent Location, which complete the set of capabilities needed for connected retail.
2. **Collaborate on New APIs:** Engage with Vydens in defining and developing the next generation of Network APIs crucial for advanced connected retail.
3. **Partnership for Value Creation:** Participate and amplify Vydens' connected digital platforms as a proven demand aggregator and strategic partner to drive significant new revenue streams for MNOs leveraging Network APIs.
4. **Innovation and Co-Creation:** Leverage Vydens' Lab as a Service, a sandbox environment where telecoms, ISVs, partners, and developers can test, validate, and demonstrate exposed Network APIs in a secure, cloud-native laboratory before going to production.

Call to Action for the Mobile Network Operator Community

We appeal to mobile network operator communities in Europe, Latin America, North America, and Asia-Pacific to collaborate with us on immediate commercial opportunities. We can do this through Vydens' Network API subscription framework developed for the retail sector (and potentially other adjacent industries we serve), by promptly exposing and actively partnering on existing and emerging Network APIs.

Priority Markets

Latin America

- Brazil

- Mexico, Chile, Colombia (future expansion)

Europe

- Spain, Portugal, Italy, United Kingdom
- France, Germany
- Netherlands, Poland, Norway, Denmark (future expansion)

North America

- United States, Canada

Asia-Pacific

- India, Malaysia, Australia
- New Zealand, Japan (future expansion)

Deployment Commitment and Adoption

From 2026 onwards, Vydens plans to initiate proofs of concept and commercial deployments with retailers in priority markets (Brazil, Spain, Portugal, Italy, and United Kingdom). Wider European scale expected from 2027-2028.

Expected Results and KPIs

Vydens commits to monitoring and reporting to GSMA the following progress indicators:

- Number of retailers onboarded and active per market
- Volume of Network API calls consumed in production (per API and per market)
- Campaign conversion rate for campaigns activated via Network APIs (coupons issued vs redeemed)
- Measurable ROI per campaign (revenue generated vs communication investment)
- Number of end consumers reached by Network API-based campaigns
- Qualitative retailer feedback on API performance and value

These KPIs will be shared confidentially with GSMA in monthly updates, as agreed in the MoU.

GDPR and Privacy by Design

Vydens was built from day one to be GDPR-compliant by design, not as a later adaptation. Privacy is not a patch — it is embedded in the architecture from the platform's conception.

Unequivocal and Transparent Consent

All data collected is with prior unequivocal consent and for specific purposes — no exceptions. Consent is requested clearly, transparently, and documented before any data collection or processing.

Total Transparency

We chose the path of transparency: each data point has documented origin, purpose, and retention period. The user has complete access to what data is collected, why, and for how long.

Removal in 2 Clicks

The customer accesses a dedicated portal and in 2 clicks removes all their data from the database. The right to be forgotten is operationally simple and immediate.

Location Management by the Operator

Critical information: Location data management remains with the telecommunications operator — never on the Vydens platform. Vydens receives only boolean confirmations (yes/no) about presence in geographic zones, without direct access to coordinates or detailed trajectories. This architectural model ensures that the most sensitive data remains under MNO control.

Data Minimisation

Only strictly necessary data is collected. The platform does not collect additional information "as a precaution" — each data point has specific and documented justification.

GDPR as Competitive Advantage

While other solutions treat GDPR as an obstacle, Vydens treats it as a competitive advantage and central pillar of the value proposition. Full GDPR compliance from conception enables operation in all European markets without adaptations or regulatory risks.

Who We Are

Vydens is an AI agentic marketing platform for physical retail, built natively on GSMA Open Gateway and CAMARA Network APIs. Vydens uses Geofencing Subscriptions, Device Location Verification, and Most Frequent Location APIs to deliver hyper-personalized engagement to consumers at the point of physical retail, without requiring GPS or app-based tracking.

<https://www.vydens.eu>