

IoT Market: Status of Enterprise adopters of IoT & operator strategies



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AI Translation



IoT market: status of enterprise adoption of IoT & operator strategies

DATE

Mobile World Congress Barcelona 2025

About GSMA Intelligence

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GSMA Intelligence is the definitive source of mobile industry insights, forecasts, and research, used around the world. Our insights cover every mobile operator, network, and MVNO in every country worldwide.

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Mobile Network
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BY THE NUMBERS

7/10

of Forbes' Top digital
companies worldwide, rely on
our data and insights

50m+

individual datapoints covering
everything from operational to
economic

4,600+

networks tracked, spanning
every country

9/10

of the top Telecoms in the world
work with GSMA Intelligence

Today's agenda

**The voice of the enterprise
adopter of IoT**

4,200 enterprises
across 21 countries &
10 vertical sectors

**The voice of the IoT
operator**

100 operators globally

What can you do with these?

**Input to strategy
planning**

**Speculate about
prospect
customers**

**Understand
present vs. future
of IoT**

**Use for
competitive
intelligence**

**Use for
partnership &
acquisition
strategy**

**Understand
different vertical &
geography needs**

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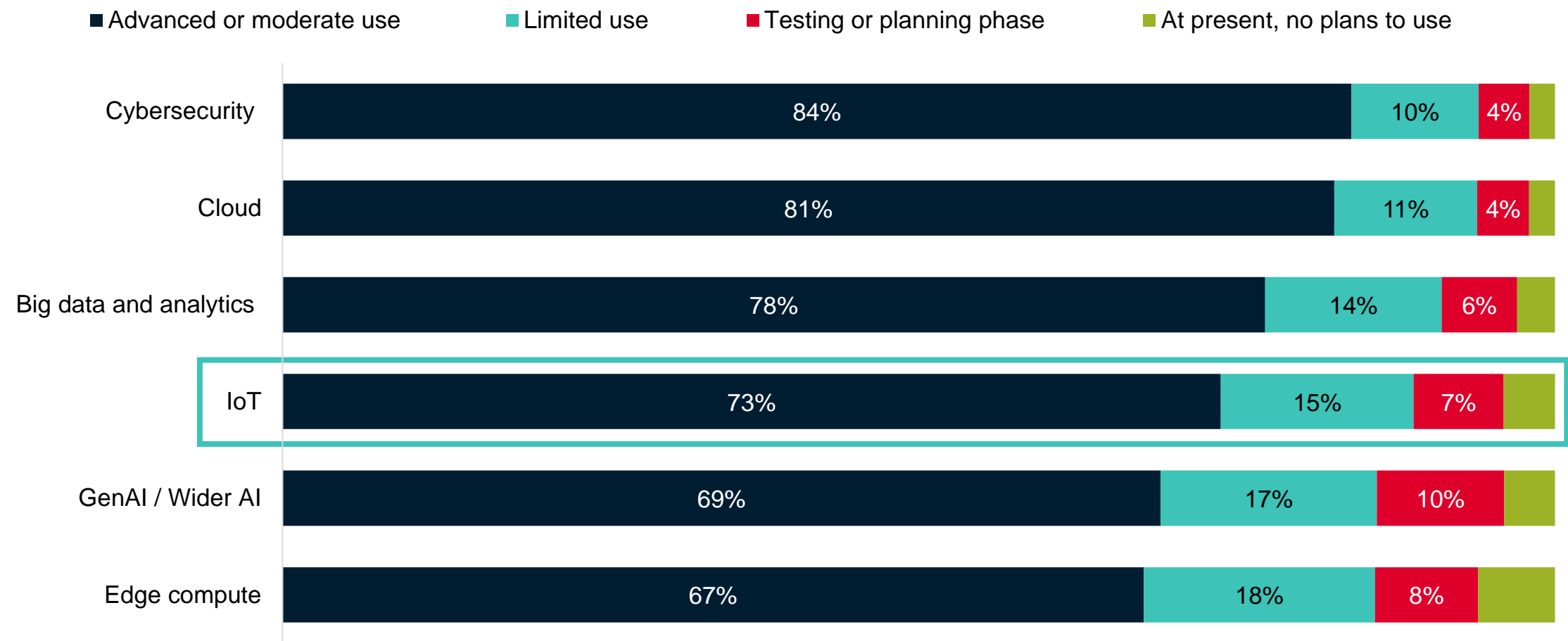
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The voice of the enterprise adopter of IoT

1. How many say they use IoT?
2. IoT as top investment area
3. ***Actual*** investment into IoT

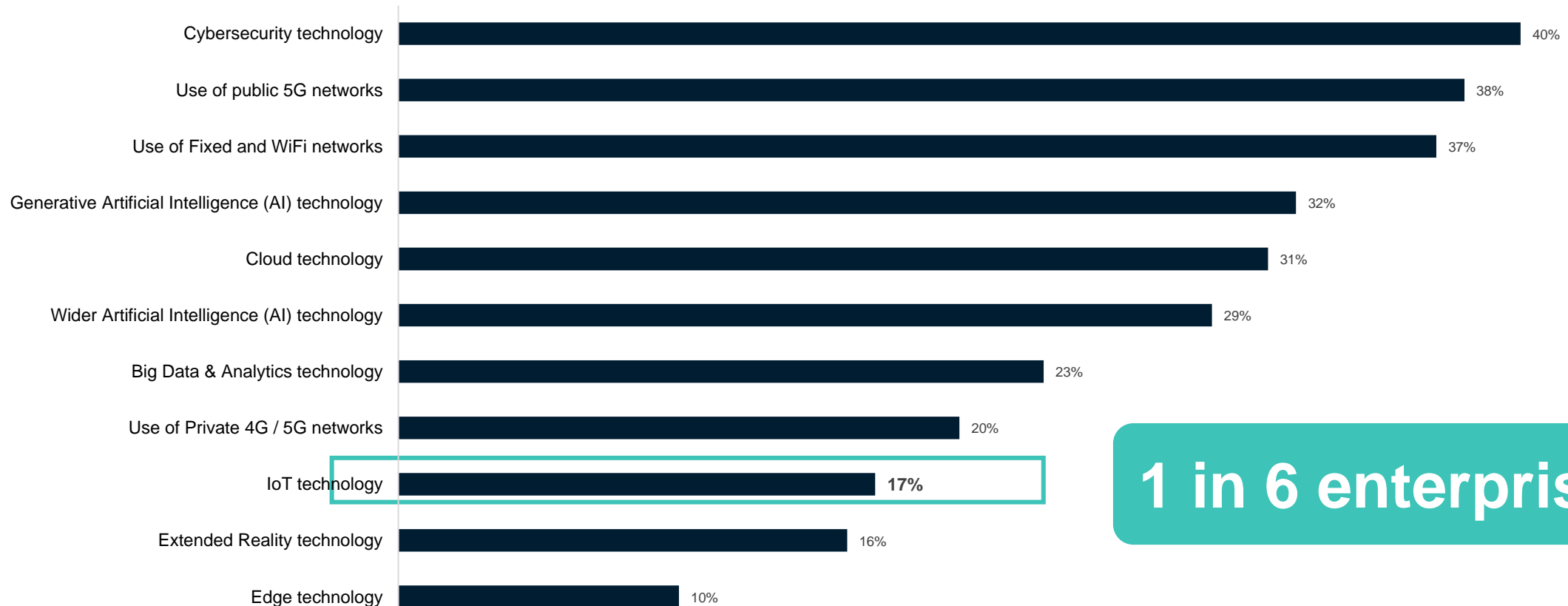
IoT sits in between established and emerging technologies in terms of level of use



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2024

1 in 6 enterprises place IoT in top 5 investments

As part of the financial spending that your company is making during 2024-2026 to support your company's digital transformation, in which technologies do you expect your company to make the greatest financial spending? – Ranked Top 5



1 in 6 enterprises

Spend on IoT technology

IoT will account for 3.4% of enterprises' total spend on digital transformation during 2024–2030

Who is spending

More than 3.4%

- Automotive
- Manufacturing
- Utilities and energy

Less than 3.4%

- Financial services
- Healthcare
- Agriculture

The voice of the enterprise adopter of IoT

- 4. IoT connectivity technologies mix**
- 5. IoT network coverage needs**

IoT network technologies mix

What type of IoT network technologies does your company expect to use in the future for IoT deployments?

**More than
1 in 2**

- 5G-based IoT
- Fixed and Wi-fi

1 in 4

- 4G-based IoT
- LPWA (LTE-M, NB-IoT)

1 in 6

- LoRa
- Satellite

IoT network technologies mix

What type of IoT network technologies does your company expect to use in the **future** for IoT deployments?

- Global averages
- Which verticals or countries sit above or below global averages?

More than
1 in 2

- 5G-based IoT
- Fixed and Wi-fi

1 in 4

- 4G-based IoT
- LPWA (LTE-M, NB-IoT)

1 in 6

- LoRa
- Satellite

IoT network coverage needs

What are the network coverage requirements of your company's IoT deployments?

Percentage of enterprises

Share of enterprises



■ A **single geographical area** in a country (e.g. a city, district or limited area) or a specific location (e.g. a campus, factory or office)

■ Other options (e.g. covering multiple countries, multiple continents)

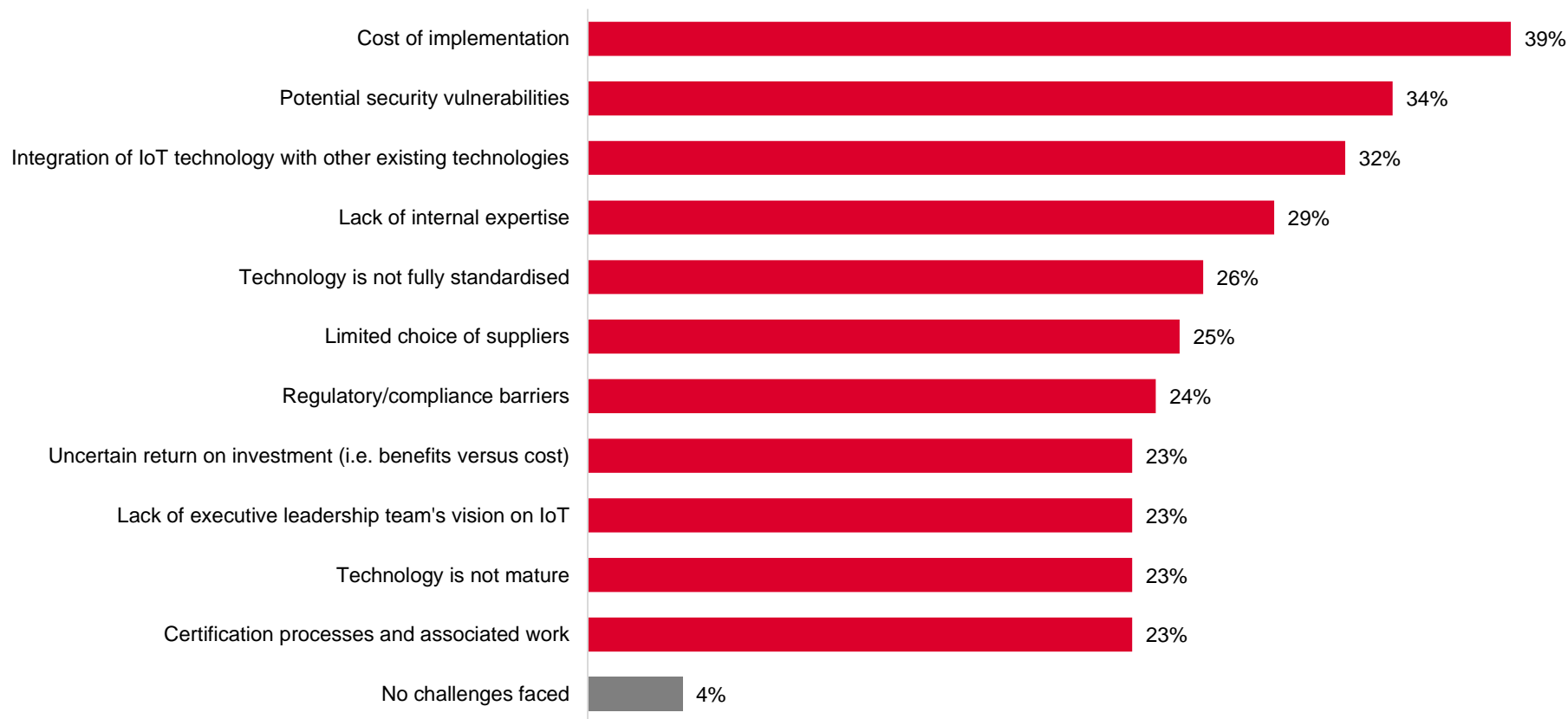
The voice of the enterprise adopter of IoT

6. Challenges in deploying IoT

Cost of implementation, security and complex tech integration are the top IoT deployment challenges

IoT deployment challenges

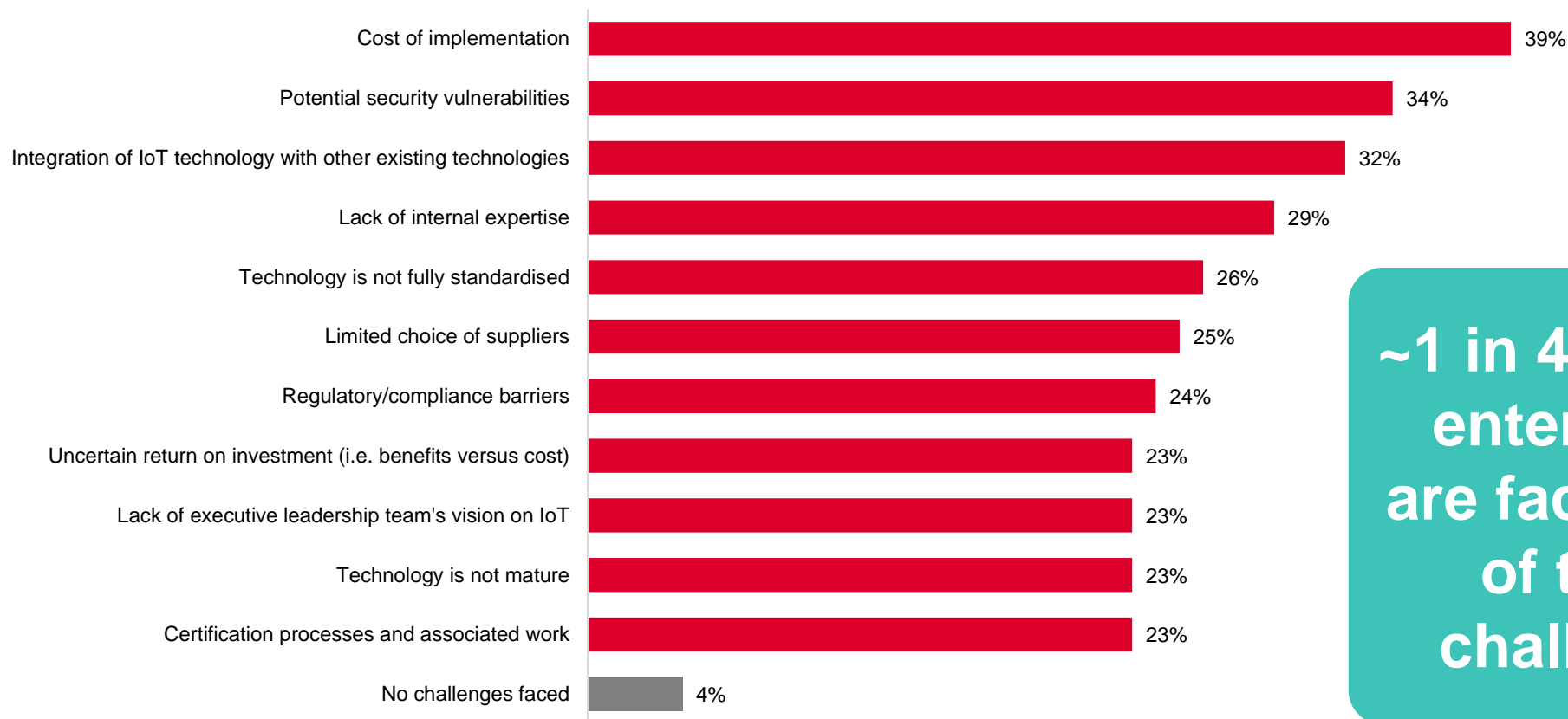
What are the challenges that your company has faced or currently faces when deploying IoT technology?



Cost of implementation, security and complex tech integration are the top IoT deployment challenges

IoT deployment challenges

What are the challenges that your company has faced or currently faces when deploying IoT technology?



~1 in 4 to 1 in 3 enterprises are facing **ALL** of these challenges

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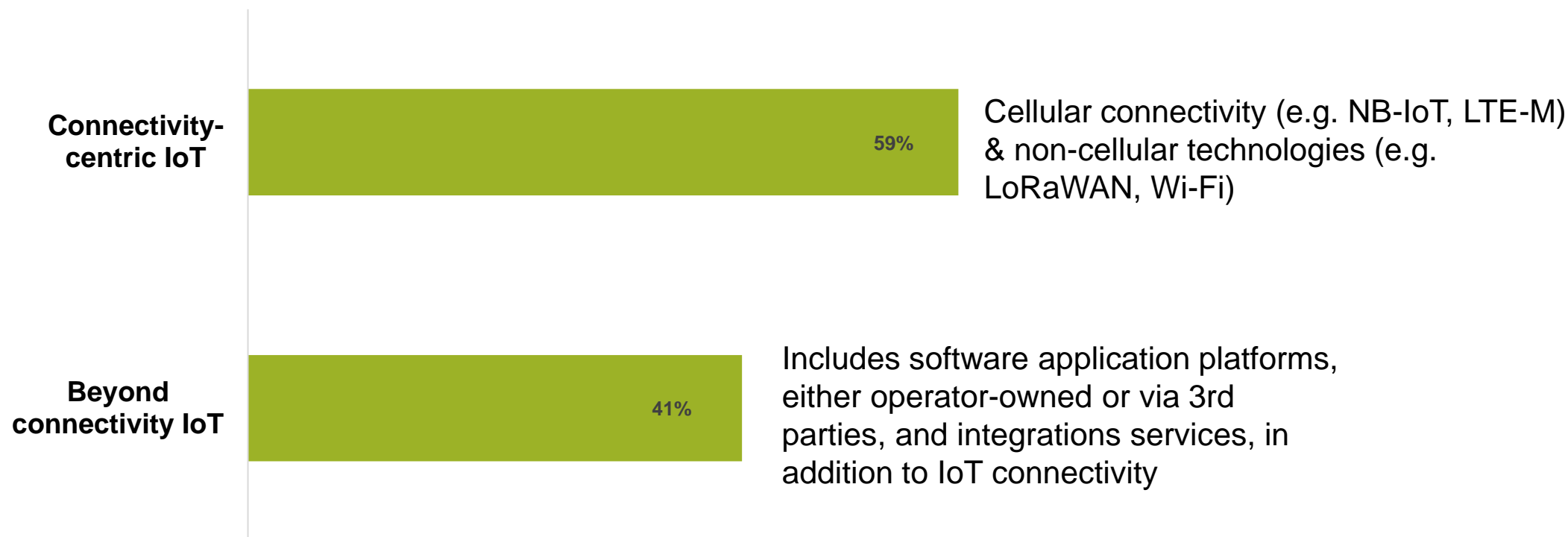
100 operators globally

The voice of the IoT operator

1. What are operators doing in IoT?
2. Do operators plan to stay in IoT?

Over half of operators in connectivity-centric IoT

Operators' IoT services portfolio

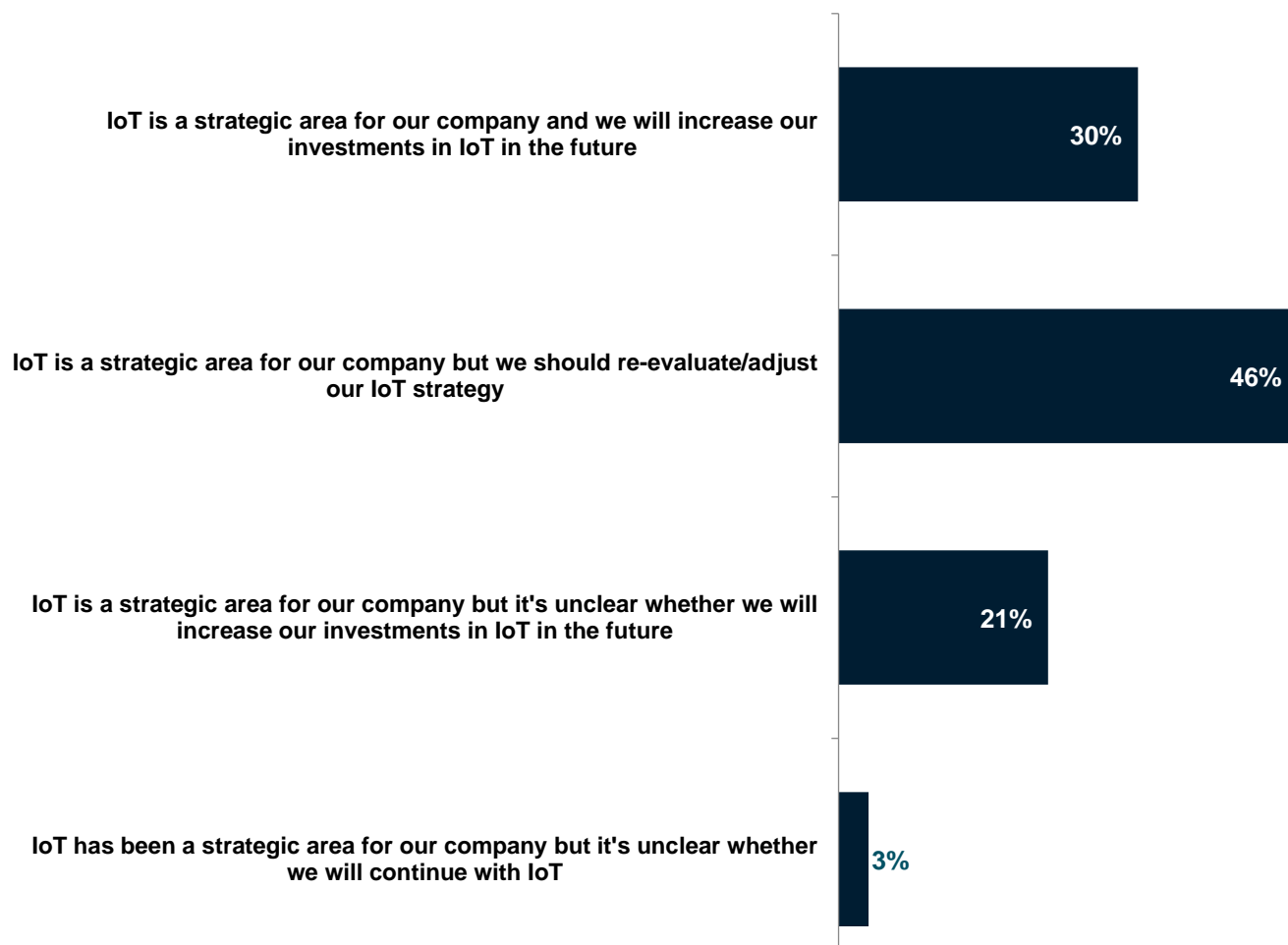


What technologies are part of your IoT offering?

Base: Those network operators of total 100 that are offering IoT services

GSMA Intelligence Operators in Focus: Enterprise Opportunity Survey

Operators plans in IoT



- 1 in 3 operators are confident in their IoT strategy
- The rest think they should re-evaluate their strategies



THANK YOU 😊

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