GSMA

Tower & Fibre Summit

06 March 2025

Hosted @

MWC
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Introduction

Moderator

Wayne Cutler

Technical Director, GSMA

AI Translation

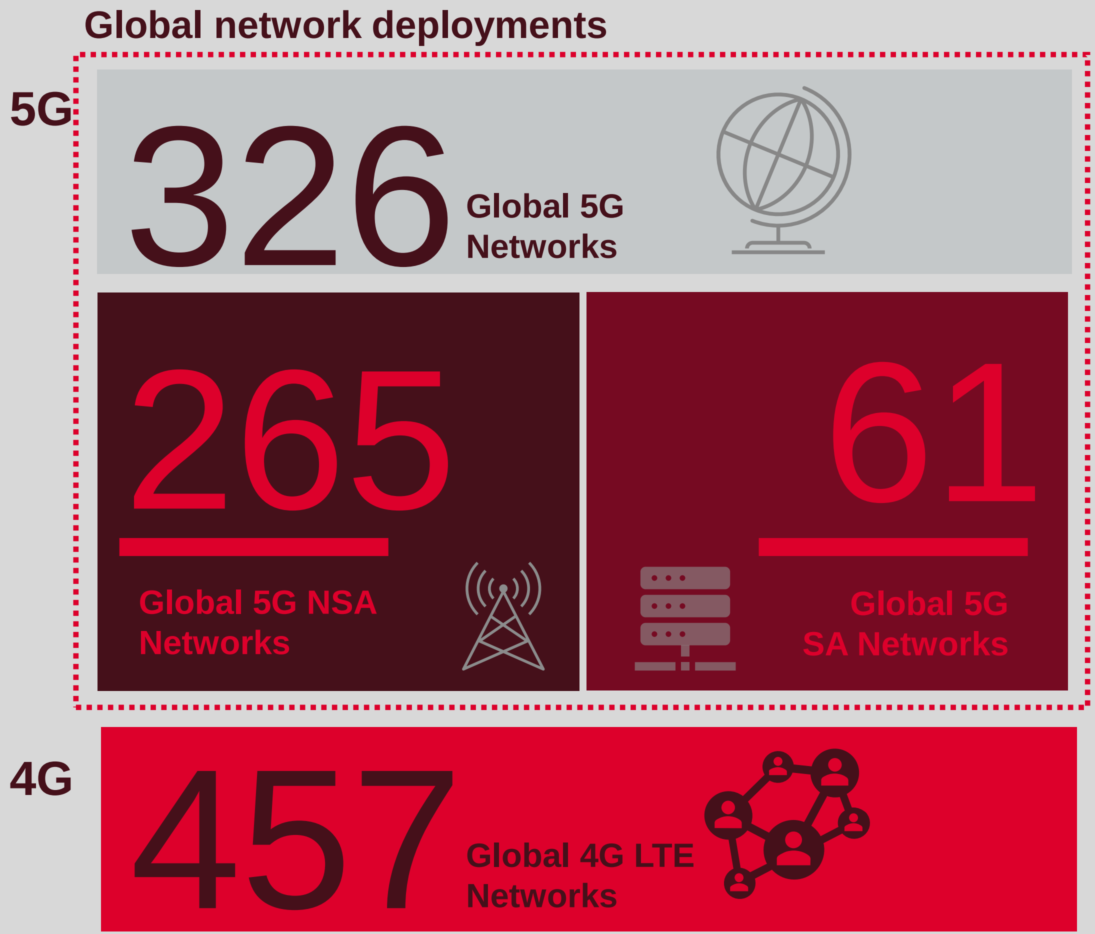
Agenda

Speaker	Topic	Format	Duration
Wayne Cutler, GSMA	Session introduction & update on current landscape	Welcome / Introduction	10 min
Jan Bongaerts, YOFC	Leading a new future with Fibre	Presentation	15 min
Lee Saunders, Aetha Consulting	Telco delayering, where might it take us?	Presentation	12 min
Javier Valle, Cellnex Telecom	The evolution of Tower & Fibre infrastructure	Presentation	12 min
Lorraine Salazar, McKinsey & Company	Perspective on Tower & Fiber	Presentation	12 min
Chris Ruettimann, Swisscom	Operational efficiency & sustainability	Presentation	12 min
Jaime Abril, Vantage Towers	Navigating the future of TowerCos in Europe	Presentation	12 min
Panel and audience discussion	The Evolution of tower and fibre infrastructure in the 5G era	Panel discussion	35 min

The global 5G landscape

5G connections worldwide surpassed **2 billion** at the end of 2024.

Some **783 mobile operators** in **200+ countries** are on the journey to Complete 5G.

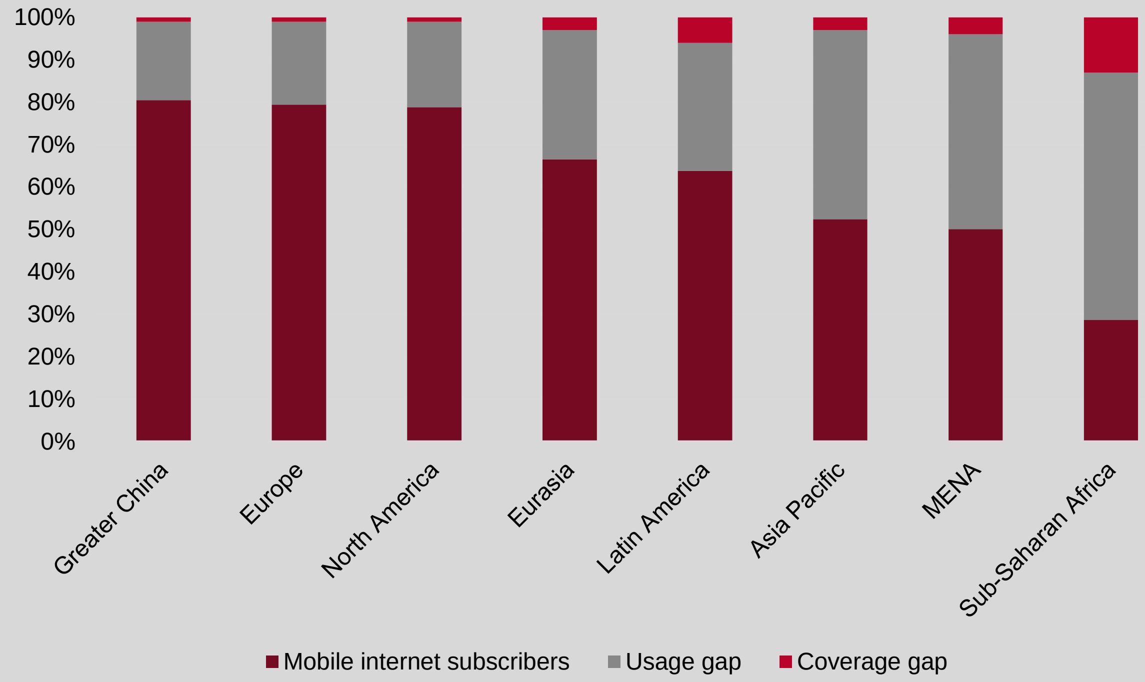


Source: GSMA Intelligence

Global mobile connectivity

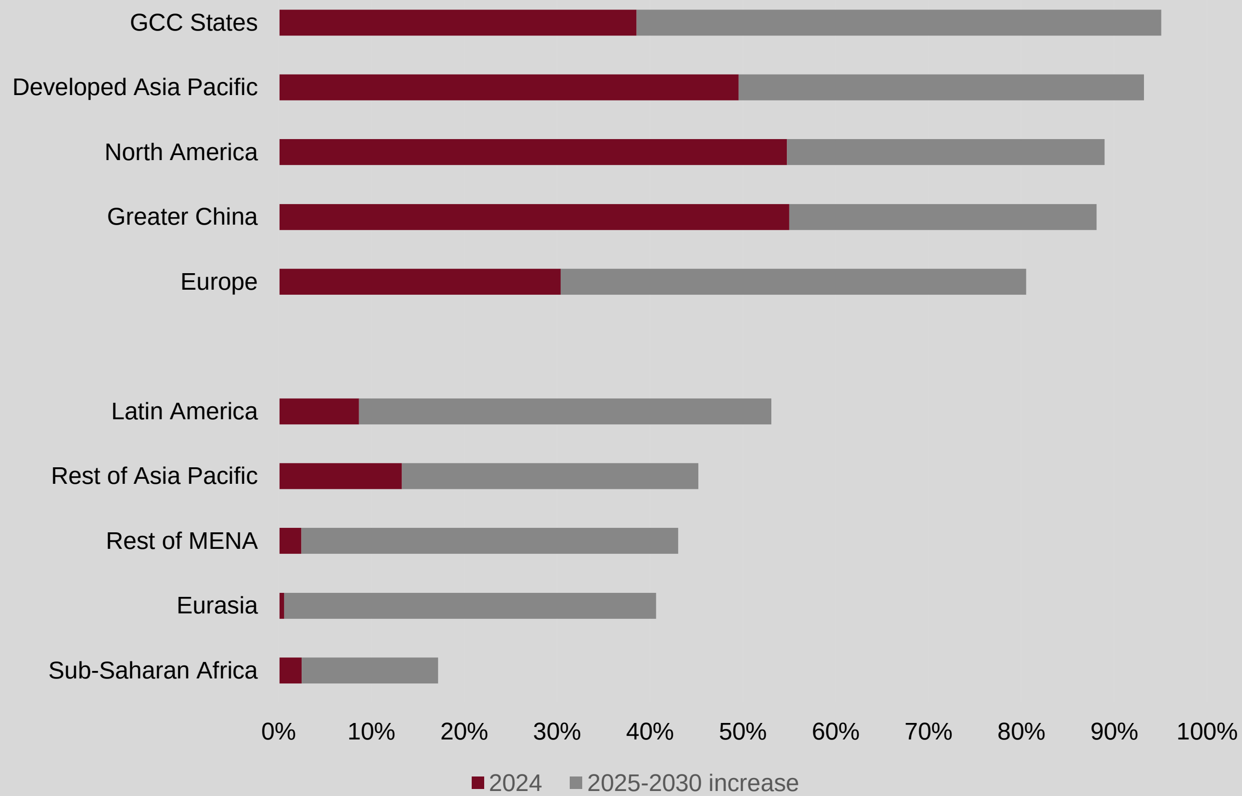
Almost **60%** of the world's population subscribed to mobile internet at the end of 2024.

By the end of 2024, **58% of the world's population used mobile internet**, equating to 4.8 billion users – an increase of 2.2 billion since 2015.



5G adoption by markets

By the end of 2024, 5G accounted for more than half of mobile connections in a number of leading markets. Growth will intensify in the second half of this decade.



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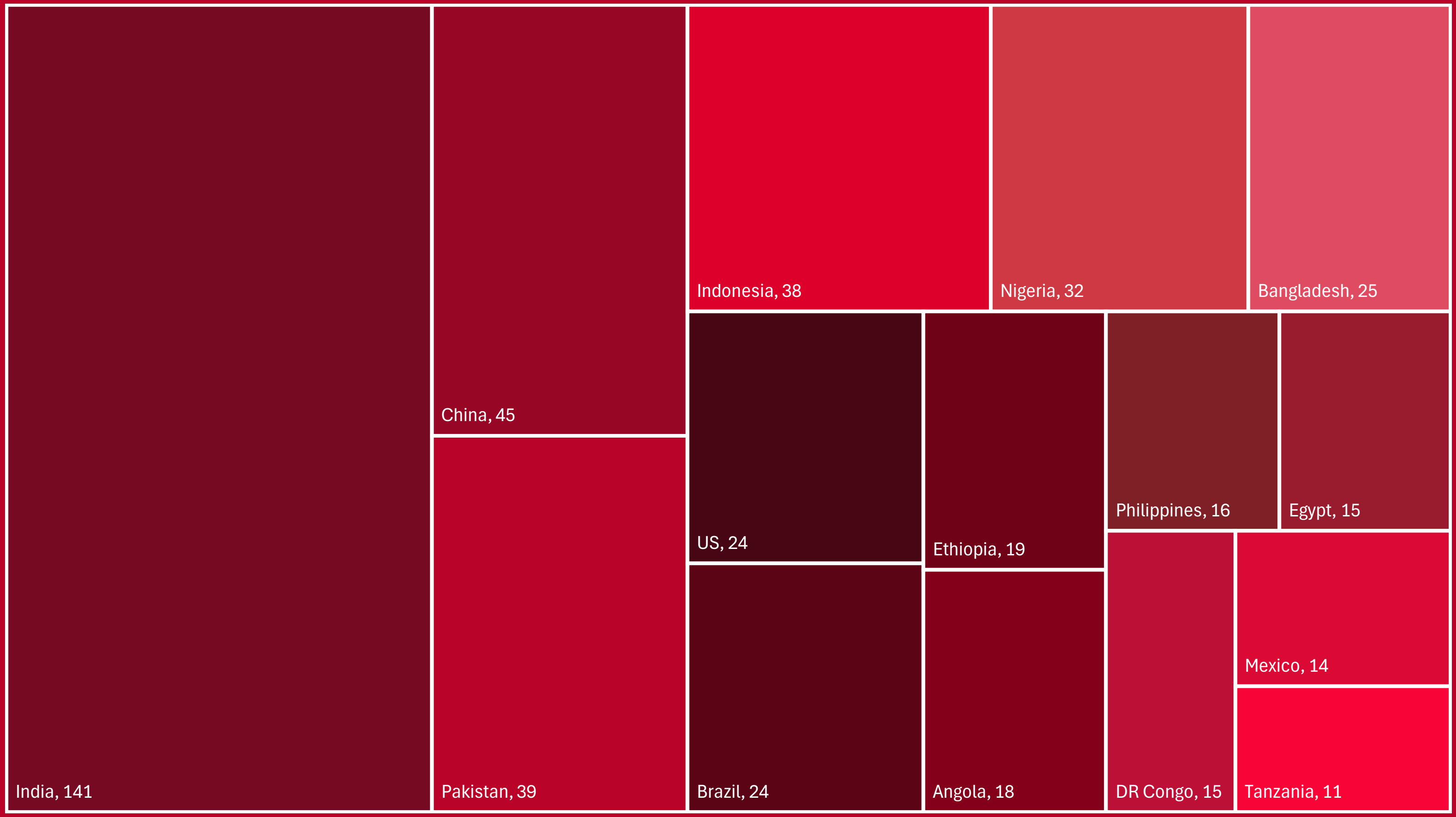
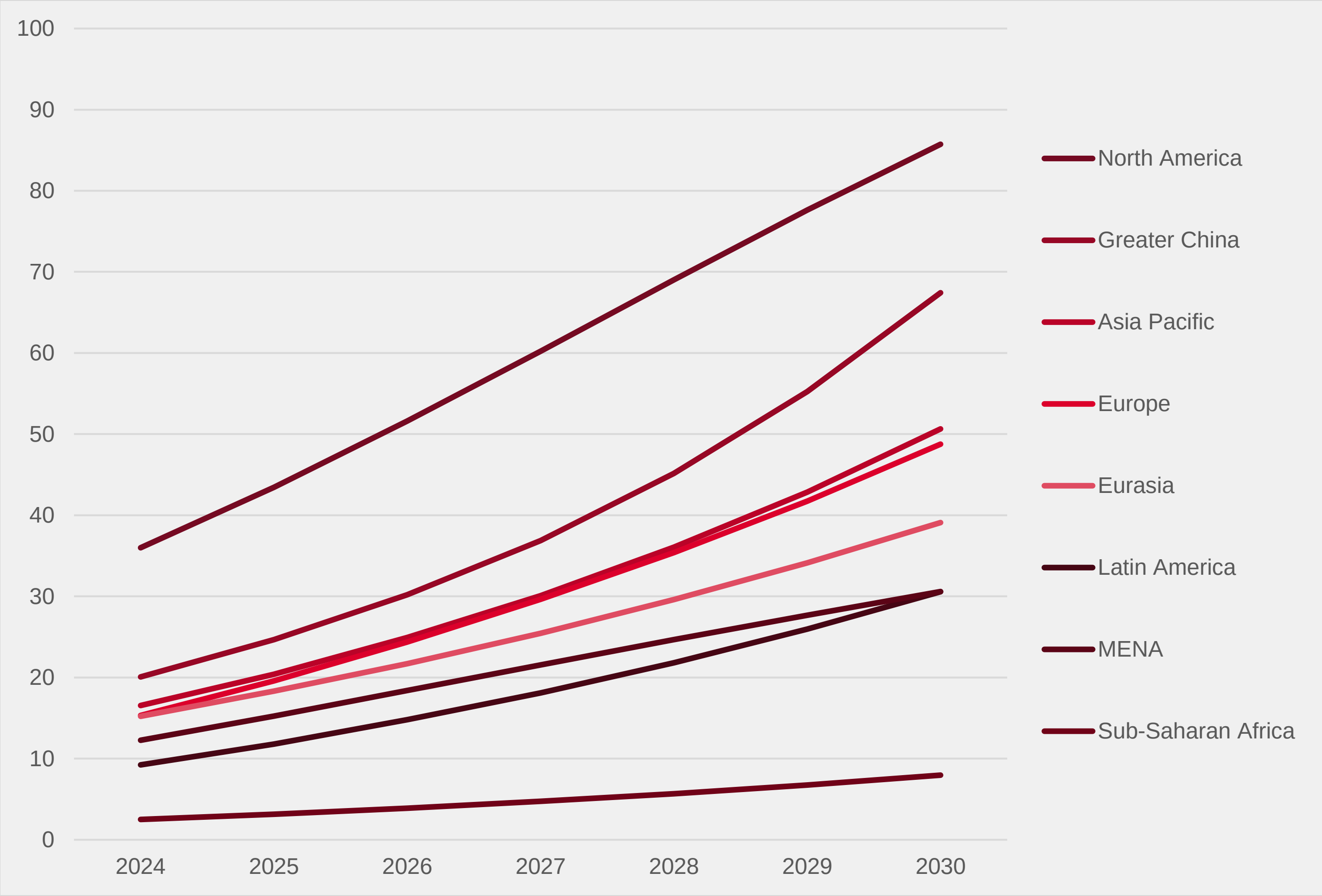
New mobile internet subscribers

There will be almost 800 million new mobile internet subscribers by 2030.



Mobile data traffic



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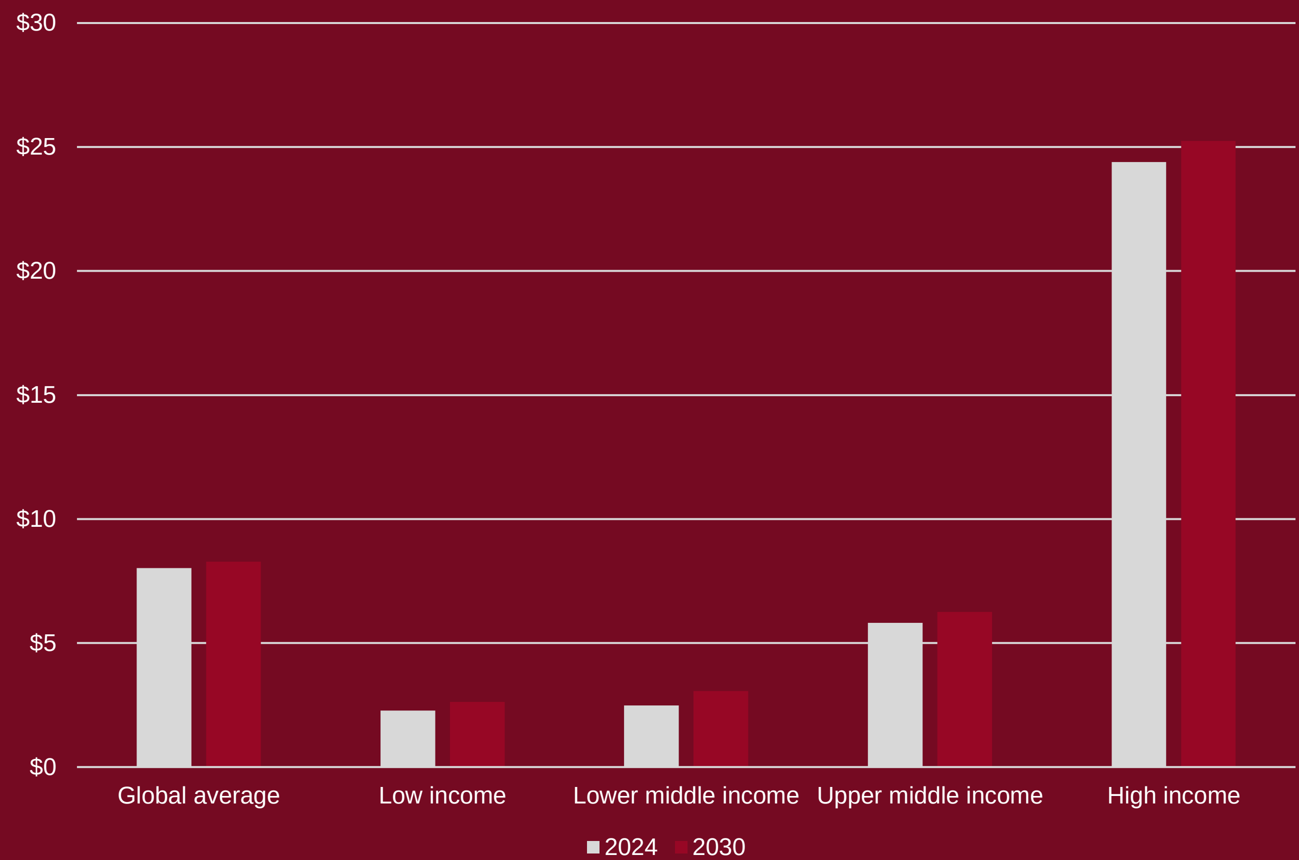
Monthly ARPU

ARPU growth will be strongest in LMICs, with a projected CAGR of 3% between 2024 and 2030 (versus 1% in high-income countries).



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Industry trends

1. Realising 5G's potential
2. Energy efficiency
3. Artificial Intelligence
4. Enterprise needs
5. Shifting consumer behaviour

1

Realising the 5G potential

After a slow start, the rollout of 5G SA networks is beginning to gain momentum. 5G SA is a top investment priority for more than 50% of operators surveyed.

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Energy efficiency

Energy efficiency has gained significant attention in recent years due to energy price increases and the advent of 5G technology.

The importance and general awareness of energy efficiency within networks remains a top priority for operators and network vendors in the short-to-medium term.

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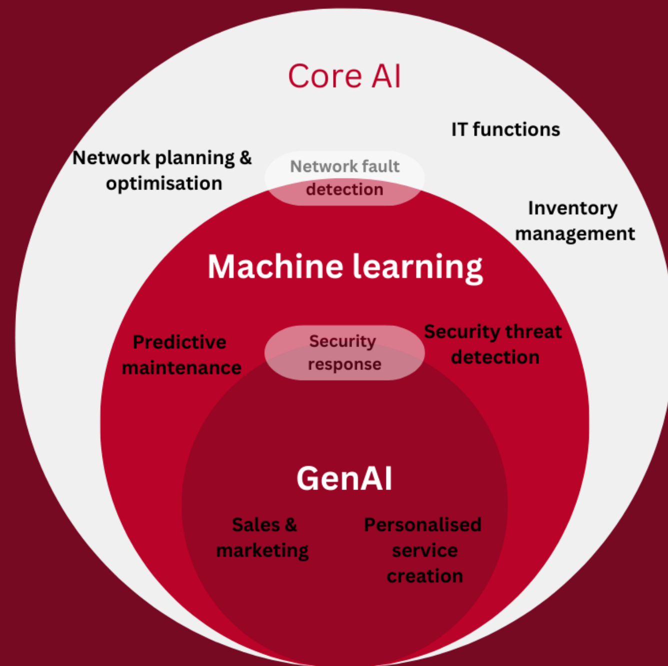
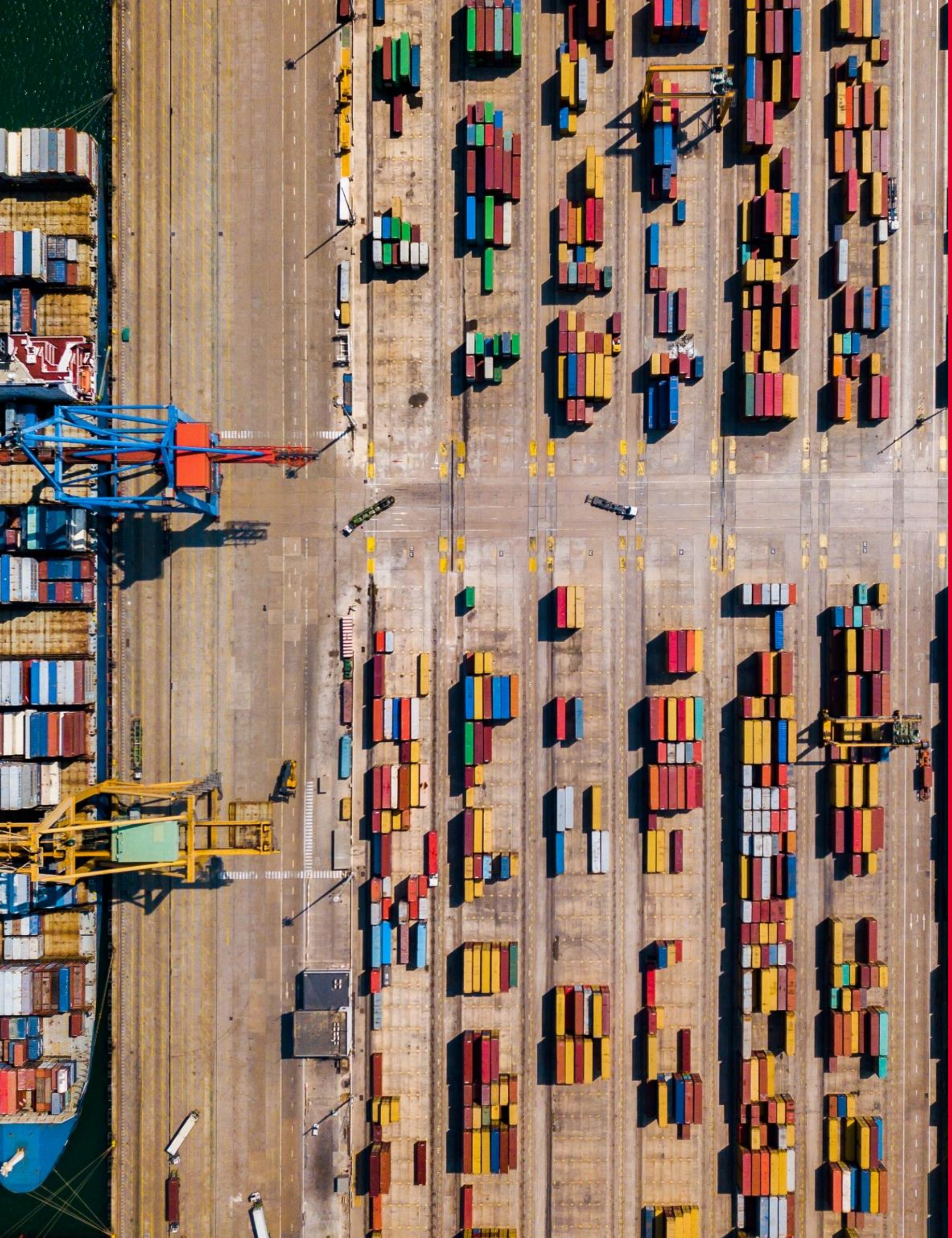
Artificial intelligence

Early deployments have focused on internal solutions to improve performance across the various layers of the telecoms value chain, such as network fault detection etc





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Enterprise needs

According to a GSMA Intelligence survey of over 4,200 enterprises, enterprise businesses consider the following as the top five priorities for digital transformation:

- Enhance security & protect against cybersecurity threats
- Increase revenues
- Enhance customer experience
- Strengthen competitive positioning
- Improve operational agility

Cost or revenue related

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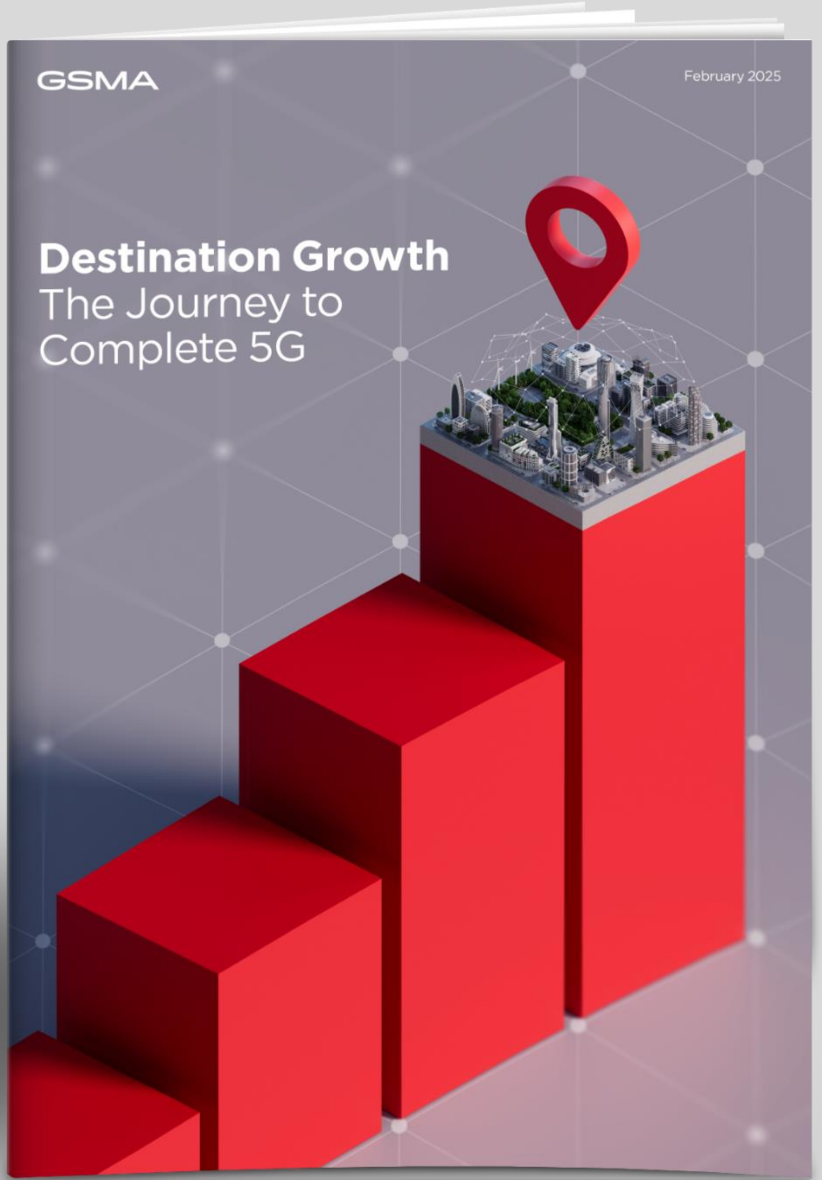
Shifting consumer behaviours

5G users are highly engaged with digital entertainment, driving demand for bundled services and speed-based pricing tiers. According to GSMA Intelligence, the **top three consumer use cases** for 5G are:

Video streaming	60%
Music streaming	54%
Cloud storage	53%
+	
Digital security	53%



Key takeaways from the report include

- Lessons from executives at different stages of the journey
- Industry challenges and pain points
- High level strategic recommendations to guide your next steps

Download the report