MWC 2025: From AI hype to AI reality

Sponsored by Red Hat

Wednesday 20th March: 2-3pm GMT

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Red Hat

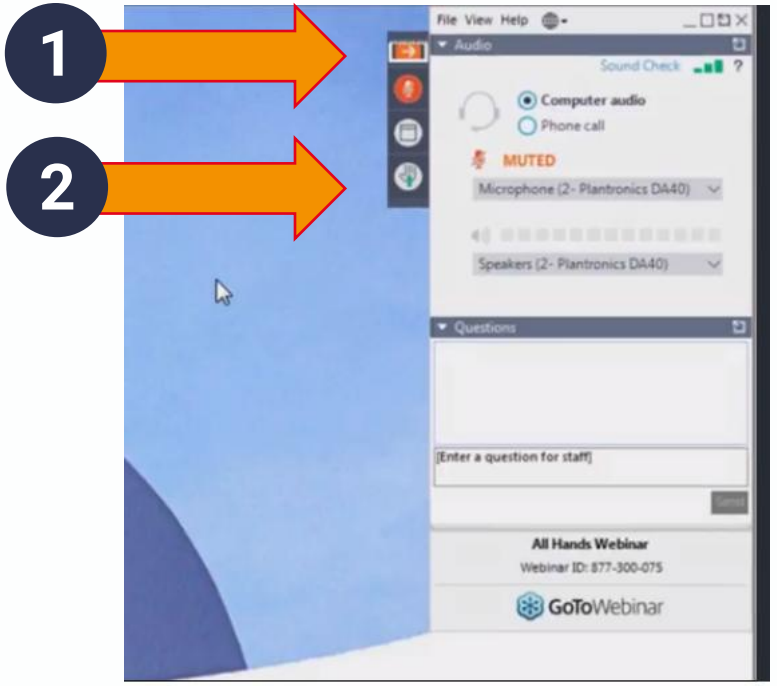
STL PARTNERS

Agenda

1	**Introduction**	14:00 – 14:05
2	**STL presentation**	14:05 – 14:25
3	**Panel and audience Q&A**	14:25 – 14:55
4	**Wrap-up**	14:55 – 15:00

GoToWebinar

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- Feel free to type questions throughout the session for Q&A at the end
- We’ll send you the slides and a recording shortly after the session do share with colleagues



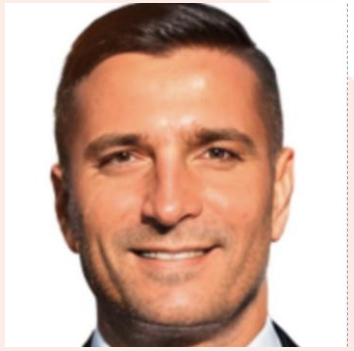
Our panelists today



IAN HOOD

Chief Technologist - Global Service Providers

Red Hat



FATIH NAR

Chief Technologist

Red Hat



MALINA BORG SIGG

Strategic Product Manager – Advanced 5G Network

Telenor



AHMED HAFEZ

VP Technology Strategy

Deutsche Telekom



KUBA SMOLORZ

Senior Consultant

STL Partners



CHRIS BARRACLOUGH

CEO

STL Partners

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Our research team's post-MWC observations in a full length-report



Click here for report's synopsis

Our research areas of expertise



Executive Briefing Service: Strategy and Transformation

- All important external and internal trends, and market drivers for strategists and decision-makers in telecoms

Adapt to new customer needs and business models



Consumer Services

New services and business models to create growth



Enterprise Platforms

Where and how to meet needs beyond connectivity

Take specialised propositions to market



Private Networks

Telecoms' role and partners in private networking



Edge Insights

Telecoms' role and partners in edge computing

Navigate technology disruptions



Network Innovation

How to achieve success with cloud-native networking

Drive sustainable growth



Sustainability Insights

Driving telecoms' and customers' shift to net-zero

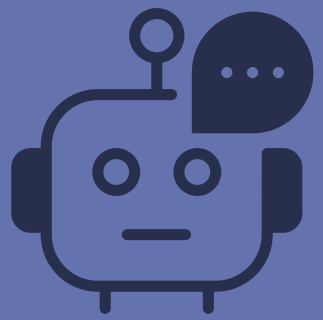
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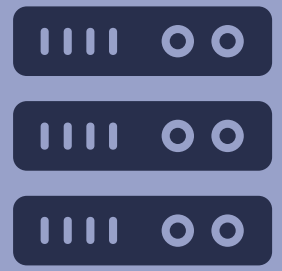
Telecoms is now part of technology

56%

of MWC25 attendees were from industries adjacent to the core mobile ecosystem



Agentic AI



Datacentres



Satellite

Geopolitics

There are two interpretations of telcos' increasing focus on cost cutting and profitability



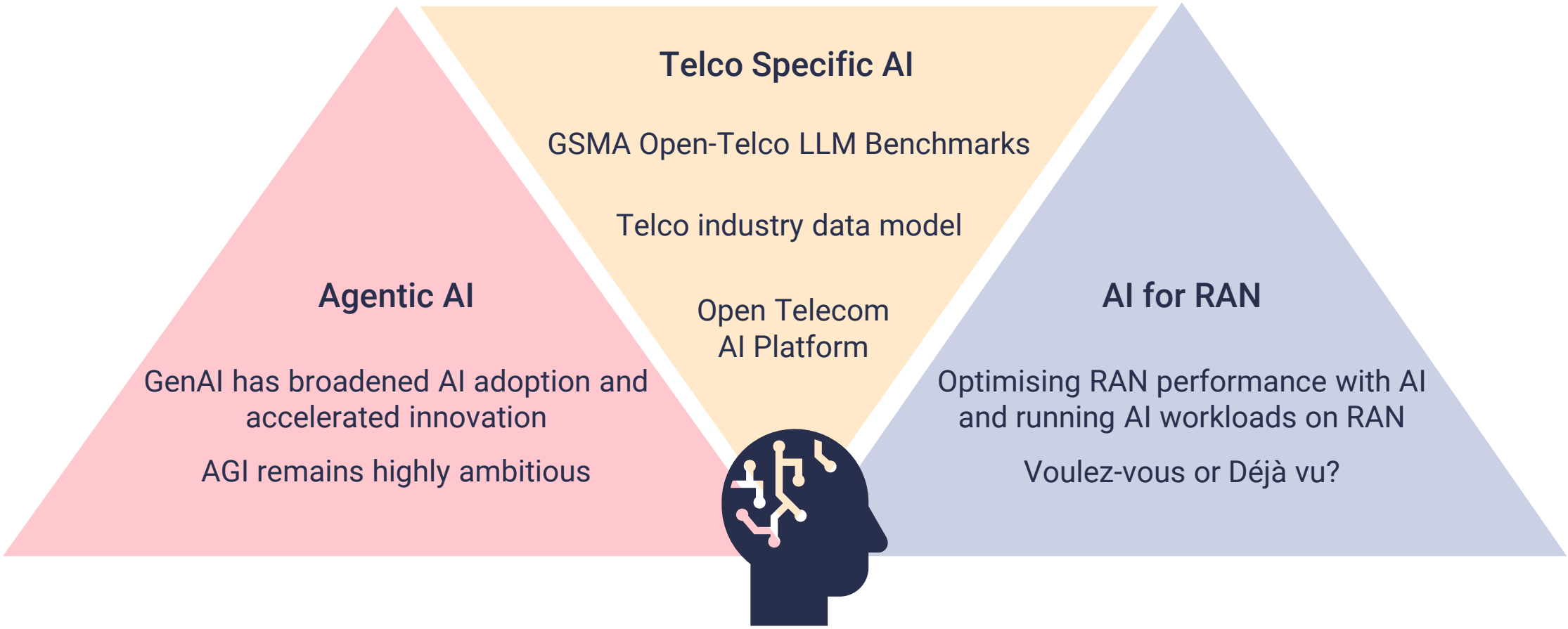


- Concrete proof points of faster process resolution (i.e. lower costs) and improved customer traction
- Demos more grounded in reality

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AI everywhere, all at once



Agentic AI stole the show, GenAI driving AI/ML accessibility beyond data science teams is accelerating this innovation

Gen AI/ Agentic AI

With GenAI, engineers and stakeholders can interact with AI in natural language, making insights and automation more accessible.

This has accelerated innovation and adoption of AI, evidenced by the hype around agentic AI

HUAWEI
中国移动 China Mobile

GLOMO awards and IntelligentRAN deployments

RAN Guardian Agent

Deutsche Telekom

Google Cloud

telenor

ERICSSON

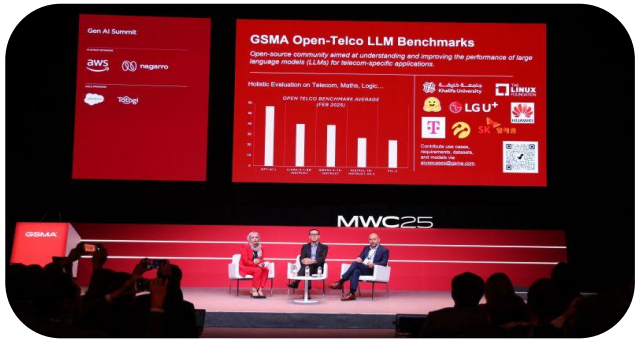
RAN agent PoC

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Several new initiatives but their real-world impact remains to be seen

GSMA Open-Telco LLM Benchmarks

Open-source community aimed at improving LLM performance for telecom applications. Standardised framework lets operators, AI researchers and developers assess the performance of their models against real-world challenges



Microsoft's Telco Industry Data Model

Enables telcos to integrate data across multiple domains (e.g., network, customer, inventory) using a telecom-specific structure for organising and managing data. Also includes built-in analytics and visualisation capabilities for deeper insights



Open Telecom AI Platform

Centralised intelligence layer that integrates AI and automation into every aspect of telecom network operation. Supports multiple LLM's, APIs, agentic AI, SLMs and ML algorithms



AI for RAN is both a cost-cutting and revenue generating exercise, but will this be a repeat of MEC?

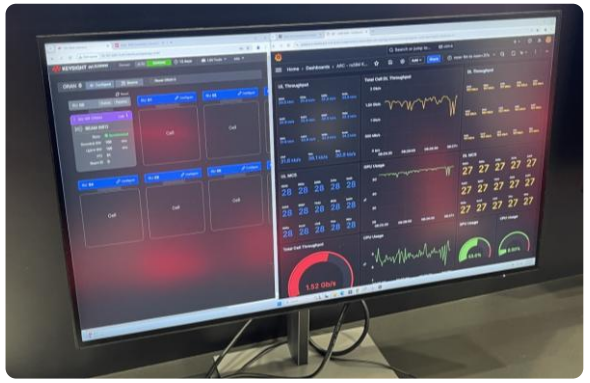
Membership of the AI-RAN alliance has increased markedly

SoftBank, T-Mobile, Microsoft, TURKCELL, NVIDIA, MAVENIR, 6G FLAGSHIP, zTOUCH, CTONE, NEC, QCT, SUPERMICRO, RIMEDO LABS, VIAVI, University of BRISTOL, DELL, Hewlett Packard Enterprise, SynaXG, TOYOTA, tietoevry, UNIST, KEYSIGHT TECHNOLOGIES, MOBISENSE, SpectrEdge, PURESTORAGE, DEEPSIG, mahindra, BROADRADIO, TATA ELXSI, CISCO, EDGECORTEX, Northeastern University, MATSING, AIRANACULUS, UTokyo, kt, MITRE, aarna.ml, Qualcomm, ITOCHU Techno-Solutions Corporation, cohere technologies, FUJITSU, AsiaInfo, KYOCERA, Globe, EURECOM, SAMSUNG, CableLabs, amdocs, bubble RAN, arm, INSTITUTE FOR INFORMATION INDUSTRY, NOKIA, ETRI, ERICSSON, boost mobile, SK telecom, REIGNS, Red Hat

*of which eight members are operators

There were many demonstrations of AI-RAN around the Fira









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Increasing telco API announcements demonstrate strong commitment

Beyond anti-fraud and digital identity

Using “basic” APIs in novel use cases

More QOD in 2025 as 5G SA expands

More Tier-1s launch their own API units

Evidence that telco APIs deliver better experience

30% improvement on app onboarding process (TikTok Brazil)

~8% increase in app signup completion (Cabify Spain)

Evidence of new monetisation still lacking

???

Beyond core telecoms we saw a big focus on data centres, cybersecurity and quantum computing

Data centres

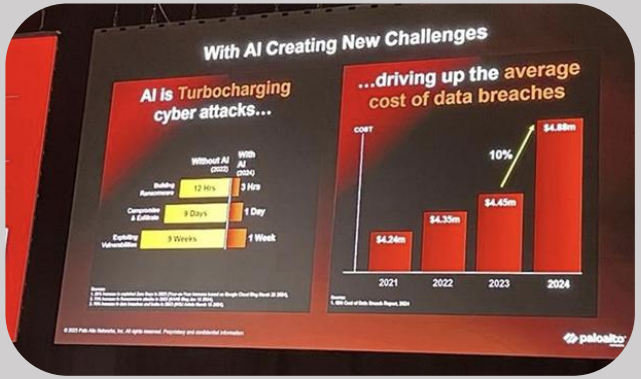
Cybersecurity

Quantum computing

SK telecom

orange™

MISTRAL AI_



Telefónica

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Thank you for listening!