



ERICSSON

Breaking the cycle of missed opportunities

**Will CSPs capture the next
wave of growth in the era
of AI, cloud and mobile?**

Executive summary

The telecoms industry is entering a period of significant opportunity.

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Advances in AI — alongside connectivity, cloud, and software-driven networks — are opening new possibilities across consumer, enterprise, and public sector markets. From private 5G and tailored digital services to large-scale IoT and platform-based models, the scope for growth is broad, global, and increasingly tangible.

As AI-driven applications and services scale, they are placing new demands on networks, creating a significant opportunity for CSPs to capture value from the next wave of digital innovation.

Confidence within the industry reflects this moment. Telecoms leaders express strong belief in their organizations' ability to innovate, expand into new areas, and capture the next wave of value. Ambition is high, optimism about future growth is widespread, and few doubt that connectivity will remain central to the digital economy.

Yet history casts a long shadow.

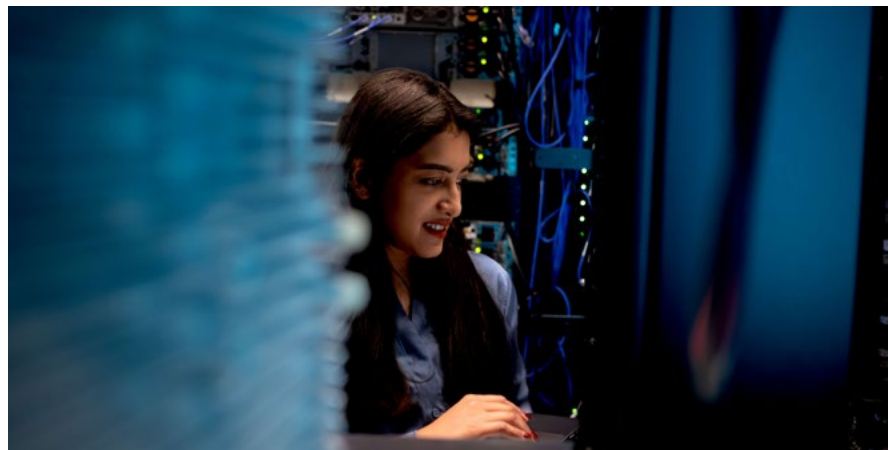
Over recent decades, telecoms leaders have repeatedly identified promising new growth opportunities, only to fall short of turning that promise into sustained commercial impact. Again and again, value has been left on the table, with others managing to react faster.

This research set out to explore a simple but critical question: is the industry genuinely better positioned to succeed this time?

Encouragingly, the findings show that change is underway. Some CSPs are already delivering tangible benefits, addressing long-standing challenges by investing in AI and automation technologies, exploring more agile ecosystems, and the adoption of cloud-native architectures.

This matters now more than ever.

Growth is no longer defined by a single use case or market, but by a diverse mix of region-specific, sector-led and application-driven opportunities — many of which demand greater speed, flexibility, and collaboration than traditional operating models were designed to support.



However, it seems such progress is not yet widespread. Many organizations remain in the early stages of the transformation required to support new growth models, if they've commenced at all. This not only impacts the operator in question but has a knock-on effect on the entire industry's ability to adapt, innovate, and realize global opportunities for monetization.

This report examines the factors that will determine whether individual CSPs and the industry are set up for success this time. It dissects the industry's legacy of missed opportunities, assesses whether lessons have truly been learned, and analyses where readiness gaps persist today. Most importantly, it draws on the research to highlight the capabilities, execution models, and approaches that are beginning to make a difference — offering practical insight to support CSPs in their journey from ambition to action.

Of course, the path to capturing these opportunities will vary across CSPs.

Differences in scale, geographic footprint, market position, and strategic priorities mean there is no one size fits all approach. Rather than prescribing a uniform approach, this research highlights the broader direction of travel — and the capabilities and execution models that are increasingly shaping outcomes across the industry.

Methodology

This report includes data from 455 technical leaders at global telecoms firms, exploring their attitudes, commercial and innovation ambitions, and their predictions for future growth opportunities for the industry.

The research respondents are all directly involved in strategic decision-making — 60% are CTOs, 31% are technical directors reporting directly into the CTO, 9% are sales directors — at communication service providers (CSPs) in the US, UK, France, Germany, Italy, Spain and Singapore.

The sample includes CSPs of varying sizes and organizational profiles, reflecting the structure of the telecoms industry, where the majority of providers operate at small to mid-scale alongside a smaller number of large, multi-market CSPs. In this research, 54% of respondents represent mid-sized organizations (100–1,000 employees), while 36% represent larger CSPs with over 1,000 employees, including a proportion of enterprises operating at significant global scale.

71% work for telco carriers (fixed line/mobile), while the remaining work for other CSPs (ISPs, Broadband Providers, Cable, Satellite, MVNOs etc.)

Commissioned by Ericsson and conducted by independent research agency Vitreous World, the research was conducted in January 2026 and launched in May 2026.



Key takeaways from this report

Data highlights:

90%

of CSPs are confident about capturing new revenue opportunities

84%

say future growth depends on scaling services rapidly

However, around

70%

have not implemented the technologies they themselves identify as priorities for future success

1.

There is no shortage of opportunity ahead, but execution will determine who captures it

Telecoms leaders are confident about future growth and clear on where opportunities lie. What remains less certain is whether existing operating models and capabilities are ready to support those ambitions at the pace and scale required.

2.

The industry has a clear view of where it has fallen short before

Respondents show strong alignment on both the opportunities telecoms failed to capitalize on and the reasons why. Legacy systems, slow decision-making, inconsistent investment and limited collaboration all continue to feature prominently.

3.

Many of the capabilities needed to unlock future growth remain under-implemented

AI-driven operations, advanced 5G capabilities, cloud-native architectures, and SaaS-based platforms are widely recognized as essential enablers of future opportunity. Yet adoption remains limited, with most CSPs still in the early stages of implementation.

4.

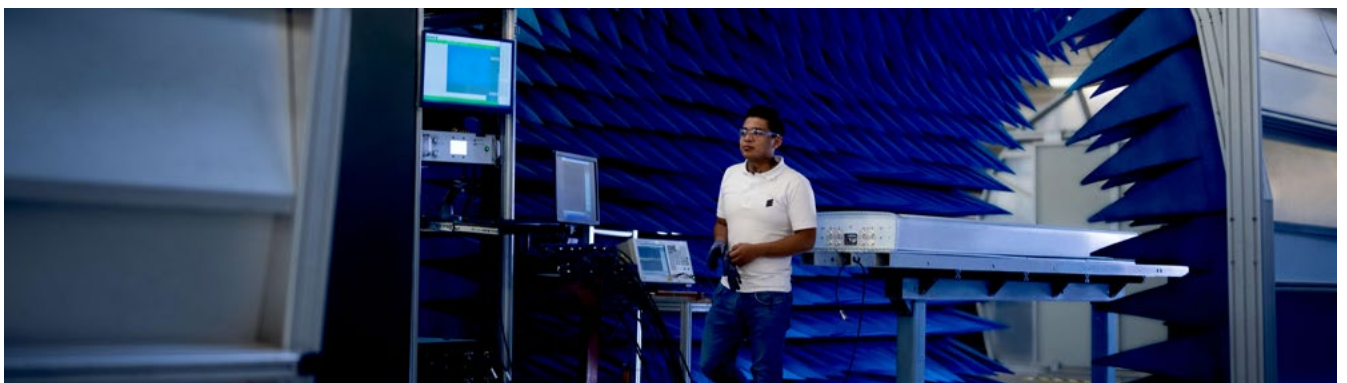
Global inconsistency in network capabilities slows down and limits CSP opportunities

The uneven availability of capabilities such as 5G Standalone limits how developers and technology providers design new products. When features cannot be relied on globally, innovation defaults to the lowest common denominator, and potential network value is left unrealized.

5.

Closing the gap with industry frontrunners will require simpler, more flexible deployment models

For many CSPs, the challenge is no longer identifying what needs to change, but how quickly those capabilities can be deployed at scale. Simplification of existing solutions, more mature cloud-native platforms and new infrastructure-light models are beginning to lower the barriers to adoption. Approaches that allow CSPs to access capabilities without heavy upfront investment or ownership offer a practical way for the wider industry to accelerate progress.



1

The Confidence Gap

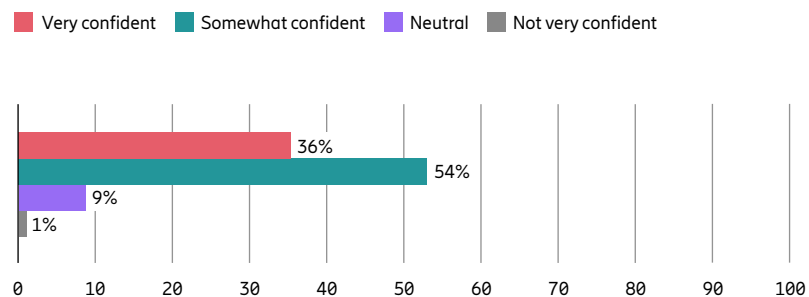
One finding stands out above all others in this research. Across regions, company sizes and markets, telecoms leaders are strikingly confident about their ability to capture the next wave of growth.

And yet that confidence is not consistently matched by evidence of readiness. The gap between belief and execution capability emerges as the defining theme of the data.

On the surface, optimism for the future is overwhelming. Fully 90% of respondents expressed confidence in their organization's ability to successfully pursue new business opportunities, with more than a third describing themselves as very confident (see figure 1).

Three quarters (75%) of technical leaders felt the telecoms industry retains a strong ability to innovate and adapt in the face of new competitive pressures, while 86% were optimistic about their own organization's ability to successfully monetize 5G over the next three years.

Figure 1: How confident are you that your organization will successfully capture the next wave of business expansion opportunities?



Taken in isolation, these results suggest an industry that feels prepared, energized, and forward-looking. However, when this confidence is set alongside other findings from the research, a more complex picture emerges.

Despite high levels of optimism, many CSPs acknowledge that critical enabling capabilities remain underdeveloped. 71% of respondents admit that rolling out 5G standalone represents a "massive challenge", a view reinforced by the fact that a majority (59%) say they have barely begun deploying 5G standalone capabilities.

At the same time, around seven in ten respondents say they have not implemented — or are not even in the process of implementing — the technologies they themselves identify as priorities for future success, including AI-driven operations, cloud-native platforms, and SaaS-based tools (see section five for more detail). This gap between ambition and action suggests that many organizations remain in the early stages of the transformation required to support new growth models.

This disconnect is reinforced by respondents' assessment of internal constraints. Nearly three-quarters agree that embedded behaviors and ways of working represent a major barrier to progress, while legacy IT and operations, skills gaps, and limited collaboration continue to rank among the most significant obstacles to unlocking new opportunities (see section two). Rather than pointing to a single dominant weakness, the data reveals a broad spread of unresolved challenges, suggesting that readiness gaps are systemic rather than isolated.

The result is a clear confidence gap that must be addressed to ensure the industry doesn't miss out to more agile outsiders once again: a divergence between how prepared CSPs feel and how prepared they appear to be in practice. Confidence in future success is exceptionally high, but the foundations required to support that success remain uneven, incomplete, or still in progress.

The remainder of this report examines how this gap emerged, why it has proven so persistent, and why it matters now more than ever. It looks back at the industry's track record of missed opportunities, explores whether lessons have truly been learned, assesses the scale and urgency of the opportunities ahead, and evaluates whether current investment and execution are keeping pace. Finally, it considers what must change if telecoms CSPs are to avoid repeating familiar patterns and what a different approach to execution could look like in practice.



2

A legacy of missed opportunities

The telecoms industry's current sense of confidence has to be viewed in the context of its recent past.

Over recent decades, the sector has repeatedly identified major opportunities to expand beyond traditional connectivity and unlock new sources of growth. Yet time and again, these opportunities failed to unlock new revenue streams for CSPs themselves.

Missed opportunities are not an occasional feature of the industry's evolution, they are a defining pattern.

From IoT platforms and digital identity to over-the-top (OTT) monetization and enterprise solutions, CSPs repeatedly identified areas where network assets, customer relationships, and scale should have delivered additional cash flow.

Instead, many of these opportunities were ultimately captured by players outside the industry — often those able to move faster, experiment more freely and scale more aggressively.

The research highlights a clear consensus on where these missed opportunities lie (see figure 4). When asked to identify the most significant growth areas the industry failed to capitalize on, respondents collectively point to IoT platforms as the single biggest missed opportunity. Monetizing OTT services and digital identity follow closely behind, alongside other initiatives such as evolved communications, mobile payments, and enterprise solutions.

Figure 4: Which of the following do you consider the telecoms industry's biggest missed commercial opportunities?

Region	#1	#2	#3
Global	IoT platforms	Monetizing OTT services	Digital identity
US	Monetizing OTT services	Evolved communication & RCS	Failure to extract full value from mobile data
UK	App stores	Mobile payments	IoT platforms
France	Digital identity	Missing the Enterprise solutions wave	Several share 3 rd place
Germany	IoT platforms	Blockchain telco consortia	Mobile payments
Italy	Evolved communication & RCS	Open APIs	Several share 3 rd place
Spain	IoT platforms	Monetizing Over-the-Top (OTT) Services	Failure to extract full value from mobile data
Singapore	Failure to enter vertical industry use cases	IoT platforms	Monetizing Over-the-Top (OTT) Services

While the precise ranking varies by region and company size, the underlying message is consistent: the industry has repeatedly found itself well positioned at the start of new waves, only to fall behind as opportunities moved from experimentation to scale.

The reasons for these failures are also strikingly consistent (see figure 5). Legacy IT and operational complexity emerge as the most frequently cited barrier, identified by global respondents as the primary reason past opportunities failed to materialize.

Insufficient or inconsistent investment in new business areas follows closely, reflecting an inability to sustain momentum beyond early pilots or trials. Risk-averse cultures and slow decision-making are also highlighted as major contributors, limiting experimentation and delaying time to market.

Other constraints reinforce this picture.

Skills and talent gaps, limited collaboration with technology and service partners, and the complexity of building new network capabilities all feature prominently in respondents' explanations. Rather than pointing to a single root cause, the data reveals a combination of structural, cultural and organizational factors that repeatedly undermined execution.

Understanding this legacy of missed opportunities is critical, not as a retrospective critique, but as essential context for assessing whether the industry is genuinely positioned to convert the next wave of opportunity into lasting growth.

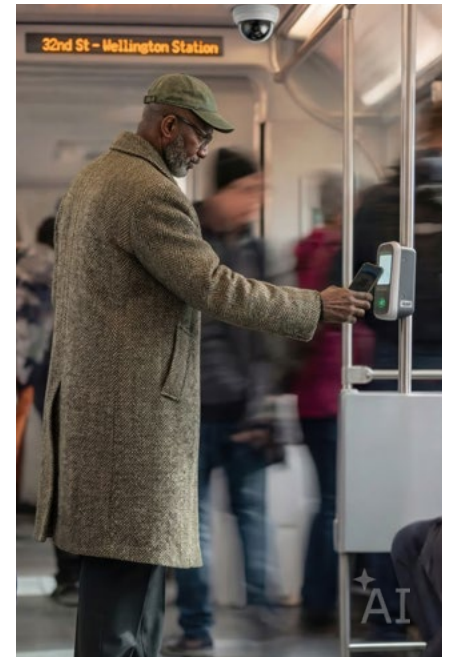


Figure 5: Which of the following do you think are the key reasons why the telecoms industry has failed to capitalize on previous commercial opportunities?

Region	#1	#2	#3
Global	Legacy IT and operations	Insufficient or inconsistent investment in new business	Risk-averse culture or slow decision-making
US	Internal skills or talent gaps	Risk-averse culture or slow decision-making	Too complex to build new network capabilities
UK	Lack of collaboration with technology and service providers	Internal skills or talent gaps	Inability to quickly roll out and test new services in-market
France	Insufficient or inconsistent investment in new business	Legacy IT and operations	Inability to quickly roll out and test new services in-market
Germany	Insufficient or inconsistent investment in new business	Inability to quickly roll out and test new services in-market	Legacy IT and operations
Italy	Legacy IT and operations	Risk-averse culture or slow decision-making	Too complex to build new network capabilities
Spain	Legacy IT and operations	Insufficient or inconsistent investment in new business	Lack of collaboration with technology and service providers
Singapore	Risk-averse culture or slow decision-making	Regulatory constraints	Organizations lacked the scale to compete

3

Lessons learned?

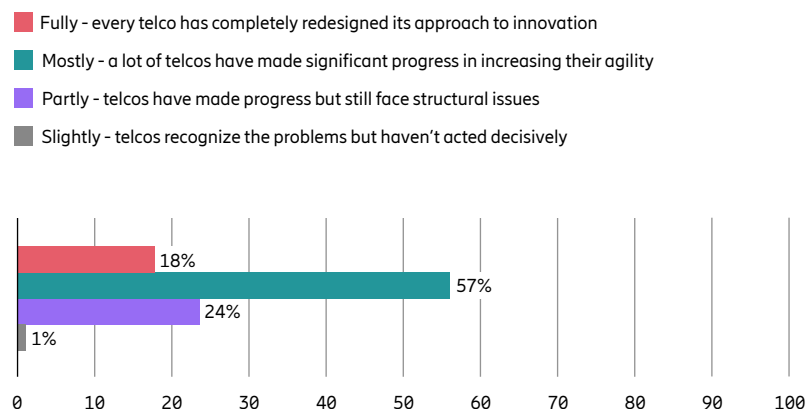
If the findings in the chapter one highlight a gap between confidence and readiness, this chapter explores a different but closely related question: whether the telecoms industry believes it has genuinely learned from the missed opportunities of the past.

On the surface, ambition and self-belief remain strong. Almost eight in ten respondents (78%) describe their organization as ambitious or highly ambitious. (Larger CSPs project particularly strong ambition, but even smaller CSPs show a clear appetite to grow beyond traditional models). 79% of respondents rated their organization's ability to innovate and create new revenue as good or industry leading.

And at an industry level, three quarters of respondents believe telecoms retains a strong ability to innovate.

Yet when the research turns explicitly to whether lessons from previous missed opportunities have been learned, this confidence begins to fracture (see figure 6).

Figure 6: To what extent do you think the telecoms industry has successfully learned the lessons of past missed opportunities?



Fewer than one in five (18%) of the technical leaders surveyed believe the industry has fully learned its lessons, while a quarter believe it has learned them only partly at best. The majority fall somewhere in between, suggesting broad awareness of past shortcomings but limited confidence that they have been comprehensively addressed.

This distinction is important. Awareness of past failures does not automatically equate to transformed execution. While many CSPs recognize the structural, cultural, and operational barriers that undermined previous growth waves, far fewer are confident that those barriers have been comprehensively addressed.

The data does suggest some lessons have been taken on board. For example, compare why respondents say the industry failed to capitalize on previous commercial opportunities (Figure 6), versus what's still holding CSPs back (Figure 7): risk adverse culture/ slow decision making has dropped out of the top three — and so has inefficient/inconsistent investment. These are still issues identified by more than a quarter of respondents, but we're moving in the right direction.

However, legacy IT and operations still claims the top spot. And internal skills gap has broken into the top three, along with a lack of collaboration with technology and service providers.

It's clear the tension between high self-belief and limited confidence in lessons learned sits at the heart of the industry's current position. Perhaps optimism about the future is being built on foundations that remain only partially reinforced.

The industry may be learning just enough to feel confident, without learning enough to fundamentally change how it executes.

As new opportunities gather pace, the question is not whether telecoms is ambitious enough, but whether it has genuinely changed enough to ensure that ambition leads to different outcomes this time.



78%

Almost eight in ten respondents (78%) describe their organization as ambitious or highly ambitious to innovate and expand business in the next 3-4 years.

79%

of respondents rated their organization's ability to innovate and create new revenue in, and beyond, traditional connectivity services as good or industry leading.

Figure 7: Which of the following do you think are the key reasons why the telecoms industry has failed to capitalize on previous commercial opportunities?

Legacy IT and operations	171 / 38%
Insufficient or inconsistent investment in new business	162 / 36%
Risk-averse culture or slow decision-making	155 / 34%
Lack of collaboration with technology and service providers	151 / 33%
Internal skills or talent gaps	149 / 33%
Too complex to build new network capabilities	147 / 32%
Inability to quickly roll out and test new services in-market	138 / 30%
Focus on technology rather than business	133 / 29%
Regulatory constraints	130 / 29%
Organizations limited by their own network footprint	123 / 27%
Organizations lacked the scale to compete	116 / 25%
None of the above	1 / 0%

Figure 8: What barriers still hold telcos back from capitalizing on new opportunities?

Legacy IT and operations	179 / 39%
Internal skills or talent gaps	161 / 35%
Lack of collaboration with technology and service providers	157 / 35%
Regulatory constraints	149 / 33%
Organizations limited by their own network footprint	144 / 32%
Focus on technology rather than business	135 / 30%
Insufficient or inconsistent investment in new business	131 / 29%
Risk-averse culture or slow decision-making	129 / 28%
Organizations lack the scale to compete	129 / 28%
Inability to quickly roll out and test new services in-market	127 / 28%
Too complex to build new network capabilities	124 / 27%
Don't know	1 / 0%
None of the above	2 / 0%

4

The next opportunities

Having expressed strong belief in their ability to innovate and grow, but less certainty that past lessons have been fully absorbed, telecoms leaders are nevertheless clear on one point: the opportunity landscape ahead is both broad and deep.

At a global level, respondents identify multiple sectors with strong potential for future growth. Consumer services, manufacturing and Industry 4.0, and financial services all feature prominently, followed closely by smart cities and public sector initiatives, transport and logistics, utilities and energy, and healthcare.

Notably, no respondents suggest that there are no meaningful opportunities for network innovation ahead — underscoring a near-universal belief that demand exists. However, the research reveals clear regional differences in where that opportunity is expected to materialize (see figure 9).

Figure 9: Thinking about your organization's target vertical markets, where do you see the best future commercial opportunities for network innovation?

Region	#1	#2	#3	#4	#5	#6	#7
Global	Consumer services	Manufacturing/ Industry 4.0	Financial services	Smart cities/ public sector	Transport and logistics	Utilities and energy	Healthcare
Region	#1	#2	#3				
US	Manufacturing/Industry 4.0	Financial services	Smart cities/public sector				
UK	Manufacturing/Industry 4.0	Financial services	Utilities and energy				
France	Consumer services	Manufacturing/Industry 4.0	Financial services				
Germany	Consumer services	Financial services	Healthcare				
Italy	Consumer services	Manufacturing/Industry 4.0	Financial services				
Spain	Consumer services	Transport and logistics	Manufacturing/Industry 4.0				
Singapore	Financial services	Smart cities/public sector	Manufacturing/Industry 4.0				

In the United States, manufacturing-led use cases and industrial connectivity are most strongly prioritized, reflecting the scale of enterprise and Industry 4.0 initiatives. In the UK, utilities and energy emerge as the leading opportunity, while in France, Germany, Italy and Spain, consumer-focused services dominate expectations for future growth. Singapore stands apart in placing greater emphasis on financial services and public sector opportunities, highlighting the role of digital infrastructure in national and city-level initiatives.

A similar pattern of regional variation appears when CSPs consider specific application-level opportunities (see figure 10). Private 5G and enterprise connectivity rank as the single most significant growth opportunity overall, particularly in markets with strong industrial or campus-based demand. AI also features strongly as a cross-cutting opportunity, with tailored consumer and enterprise digital services — including AI-enabled applications, premium video, gaming, voice, extended reality, and IoT — being highlighted across most regions. While wide-area enterprise IoT connectivity is widely seen as a key opportunity in transport, logistics and utilities-heavy markets.

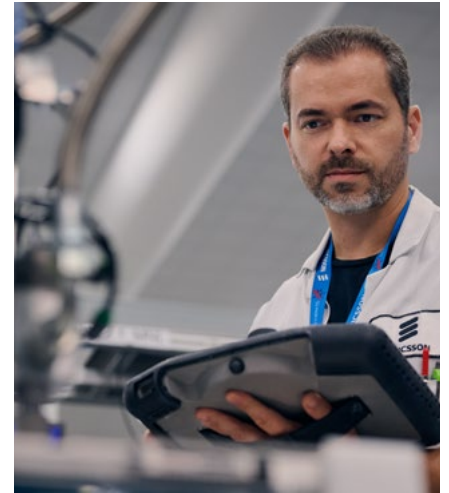
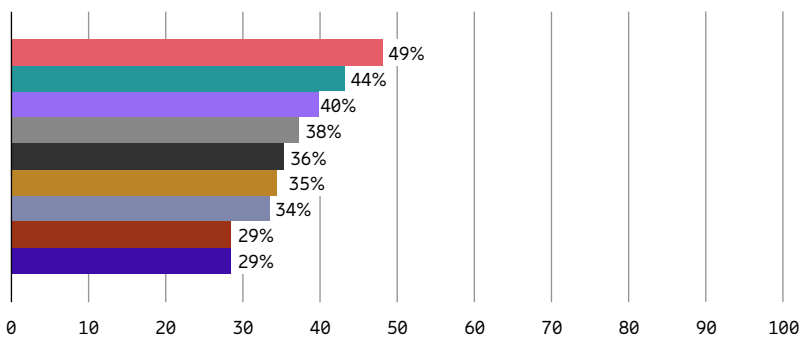


Figure 10: Which of the following areas do you think offer the biggest opportunities for CSPs to grow new sources of network services revenue in the next three to four years?

- Private 5G / enterprise connectivity (e.g. manufacturing, campus networks)
- Consumer/Enterprise digital services with tailored performance (e.g. premium video, gaming, voice, XR, IoT, AI)
- Wide Area Enterprise IoT connectivity (e.g. transportation, logistics, utilities)
- Network APIs, platforms and ecosystems monetization (e.g. CAMARA APIs)
- Government, municipality and public sector (Public safety, Smart City, Defense)
- Data monetization and analytics-driven products
- Fixed Wireless Access for consumer / enterprise
- Local breakout in foreign countries for new or improved roaming connectivity services
- Mobile satellite services



A critical consideration when discussing regional nuances is the availability of network capabilities, and the impact that inconsistent deployment has on the entire industry's ability to realize opportunities. With many modern services, devices, and applications designed for global distribution, they must operate reliably across multiple locations and network environments. The trouble is, where capabilities such as 5G SA, network slicing, or low-latency performance are only available in select markets, they cannot be assumed as part of a product or service design, leaving technology providers with no choice but to prioritize broad compatibility — and design to the lowest common denominator (typically 4G or 5G NSA). This dynamic has important implications for the entire industry.

A widening gap between 'trailblazers' and those yet to kick off deployment of capabilities not only limits the ability for certain CSPs to capture value, but can also constrain the role that networks in general play in enabling new global use cases and device categories. As opportunities become increasingly ecosystem-driven and international in nature, the ability to deliver scalable, consistent network capabilities across markets becomes a key enabler of monetization in the next wave of growth.

Beyond the headline opportunities, the data also points to a growing interest in capabilities that enable broader ecosystems to form. While not always

ranked among the top three priorities, areas such as APIs, platform-based services and cross-industry collaboration appear consistently across responses, suggesting an emerging recognition that future value will increasingly be created by enabling others to build AI-driven services and applications on top of network capabilities, rather than delivering all services directly.

Taken together, these findings paint a clear picture of an industry with no shortage of opportunity, but one facing increasing complexity. The opportunities ahead are varied, regionally differentiated and often highly specific in their requirements. Capturing them will depend not just on recognising where demand exists, but on the ability to respond with flexibility, precision, and speed across very different market contexts.



5

Putting plans into action?

There is little ambiguity about what telecoms CSPs believe they need to do next. When asked to identify priorities for future investment, respondents converge on a clear set of capabilities.

Notably, AI-driven network operations emerge as the single most important priority, ranked first by respondents as a critical enabler of future growth. 5G technologies such as standalone and network slicing, and the adoption of SaaS-based IT and network platforms also consistently emerge as the top-ranked areas of focus.

Across regions and company sizes, the industry shows a high degree of alignment on what it believes will underpin future growth.

However, when the research shifts from identification to implementation, the picture changes sharply.

Despite being ranked as top priorities, a surprisingly small proportion of CSPs say they have actually implemented — or are even in the process of implementing — these capabilities (see figure 11).

Figure 11:

	Of the following list, what do you believe CSPs should prioritize in order to fully capture future commercial opportunities in network services?	% that have not been implemented/ or in progress
#1	Implement AI-driven network operations	66%
#2	Implement advanced 5G technologies across own network footprint (5G SA, network slicing etc.)	61%
#3	Adoption of SaaS IT platforms / tools	68%
#4	Secure MVNO partnerships to complement own network footprint	71%
#5	Greater openness to ecosystem partnerships	68%
#6	Deploy SaaS network services to complement own network (e.g. core network SaaS etc.)	71%
#7	Adopt new leadership / talent strategies	72%
#8	Adopt cloud-native architectures and operations	68%
#9	Embrace a cultural shift toward experimentation and fast failure	73%
#10	Pursue more agile procurement and vendor models	71%

Clearly, there are trailblazers within the industry which are ahead of the curve, and that's to be expected — not all can be equal in terms of resources and capabilities. But while the rest broadly agree on what needs to change, they must now take the concrete steps required to embed changes into their networks and operating models. For now, adoption of capabilities that are widely viewed as essential enablers of future opportunity remains the exception rather than the norm.

The pattern holds across technologies. 5G capabilities are seen as critical, yet most CSPs acknowledge they remain at an early stage of deployment. AI-driven operations are widely discussed as transformative, yet implementation is still limited. SaaS-based platforms are recognized as a route to greater simplicity, flexibility and speed, yet most organizations have not adopted them at scale. The result is a set of priorities that are clearly understood, but largely unrealized.

A widening gap between 'trailblazers' and those yet to kick off deployment of capabilities not only limits the ability for certain CSPs to capture value, but can also constrain the role that networks in general play in enabling new global use cases and device categories. As opportunities become increasingly ecosystem-driven and international in nature, the ability to deliver scalable, consistent network capabilities across markets becomes a key enabler of monetization in the next wave of growth.

This creates a narrowing window for action. As external competitors continue to invest aggressively and move quickly, slow or partial implementation of priority capabilities carries an increasing cost. The risk is not simply that opportunities are delayed, but that they are captured by others while foundational capabilities remain underdeveloped.

Taken together, the findings highlight a persistent and increasingly urgent execution gap. Telecoms CSPs appear aligned on what success requires, but the pace of implementation is not keeping up with either their ambitions or the competitive reality they face. With the majority of CSPs still lacking these critical capabilities, acting now — rather than incrementally — will be central to whether stated priorities translate into sustainable growth.



6

How to avoid the mistakes of the past

If the telecoms industry is to avoid repeating a familiar cycle of missed opportunities, the research suggests that the focus must shift from strategy to execution.

The question is no longer whether CSPs understand what needs to change, but whether they are prepared to change how they build, deploy and scale capabilities in practice.

Encouragingly, respondents are clear about which investments they have seen make a positive difference (see figure 12).

Figure 12:

Which of the following factors have made the biggest positive difference to the commercial success of your organization's network service offering in recent years?

#1	Increased automation / AI-driven operations
#2	More agile procurement and vendor models
#3	Adoption of cloud-native architectures and operations

When asked what has made the biggest positive difference to their network service offering in recent years, CSPs point first to increased automation and AI-driven operations, followed by more agile procurement and vendor models, and the adoption of cloud-native architectures.

The data also makes clear what CSPs believe will matter most going forward. Large majorities agree that the ability to scale new services rapidly will be crucial to future success (84%), while an even greater proportion emphasise the importance of being able to experiment more easily (85%). These findings reinforce a consistent message running throughout the research: speed and flexibility are no longer optional advantages, but core requirements for capturing new opportunities.

Our future growth is dependent on our ability to rapidly scale our service deployments

Net agree

84%

However, these capabilities are difficult to achieve within traditional operating models. Long deployment cycles, tightly coupled infrastructure and rigid investment approaches make it hard to move quickly from trial to scale or to respond dynamically as opportunities evolve. This helps explain why so many CSPs continue to struggle to translate ambition into execution, even when priorities are clearly defined.

The research also points to a growing recognition that future success will depend on greater openness and collaboration. Interest in more agile vendor models, ecosystem partnerships and new ways of extending network capabilities beyond owned infrastructure reflects an emerging shift in mindset. CSPs are beginning to acknowledge that not every capability needs to be built, owned and operated in-house and that leveraging external platforms, services and partnerships can be a faster route to market.

Taken together, these findings highlight a clear direction of travel. Avoiding the mistakes of the past will require operating models that support automation, cloud-native deployment, rapid scaling and continuous experimentation, while enabling greater collaboration across ecosystems. For telecoms CSPs, the challenge is not identifying these principles, but embedding them deeply enough to change how opportunities are pursued — and outcomes delivered — in practice.

Having the ability to more easily and quickly experiment or trial new connectivity services would be a major advantage for our business

Net agree

85%



7

Simpler, more flexible deployment models

The findings of this research point to a clear need for change — not in ambition or intent, but in how telecoms CSPs execute.

Capturing the next wave of opportunity will require operating models that allow capabilities to be deployed, adapted and scaled far more quickly than has traditionally been possible.

Across the data, CSPs consistently highlight the importance of speed, flexibility and experimentation. Automation, cloud-native architectures and more agile procurement and vendor models are already delivering tangible benefits for those that have adopted them. To increase adoption further in follower and late adopter segments, optimization and simplification of solutions within existing capex model is necessary.

At the same time, there is growing recognition that future success will depend on complementing owned network assets with new ways of accessing and consuming capabilities, rather than relying solely on the long deployment cycles and heavy upfront investment associated with owned network footprints.

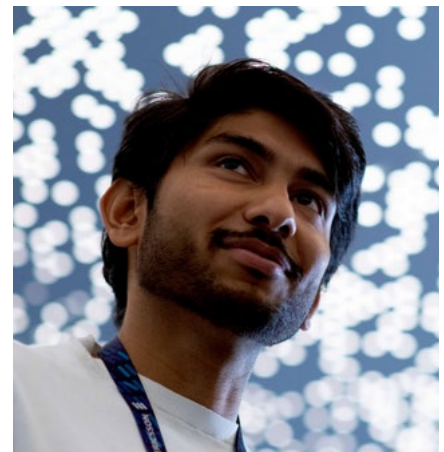
This shift is reflected in rising interest in SaaS-based network services, ecosystem partnerships and models that extend beyond traditional, self-contained networks.

These approaches offer a practical route to reducing friction between strategy and delivery, enabling faster experimentation, and scaling new services in line with demand, to new locations and users.

Crucially, they support hybrid strategies in which CSPs retain control of core assets while gaining the flexibility needed to respond to diverse and fast-moving opportunities.

Aduna Global and Ericsson On-Demand, are two initiatives that reflects this emerging execution model. By offering core network capabilities as cloud-native, consumption-based services from a global hyperscale SaaS platform, On-Demand enables CSPs to add, adapt and scale functionality without being constrained by traditional build-and-own approaches. Positioned as a complement to existing networks rather than a replacement, it provides a concrete example of how telecoms CSPs can begin to close the gap between ambition and execution. Aduna Global was funded in 2025 in a joint venture between Ericsson and major telecom CSPs with the purpose to unify global network capabilities, enabling developers to easily integrate network features into applications.

In a market defined by rapid change, the ability to execute faster, more flexibly and in closer collaboration with partners is becoming a competitive capability in its own right.



Conclusion

This research reveals an industry at a familiar point in its evolution. Confidence is high, ambition is clear, and the opportunity landscape ahead is well understood.

Yet the gap between belief and execution remains persistent. History shows that this gap has repeatedly shaped outcomes for the telecoms sector.

Telecoms leaders are not struggling to identify opportunities. Time and again, they have recognized where growth could emerge and articulated bold strategies in response. The real challenge — and where leadership must now focus their efforts — is translating that vision into action at pace and scale. Legacy systems, ingrained behaviors, and rigid operating models have often slowed progress, allowing others to move faster and capture value. And CSPs mustn't let the past repeat itself.

What makes the current moment different is not the nature of the opportunity, but the speed at which it is unfolding and the intensity of competition surrounding it.

The rapid rise of AI-driven applications and services is accelerating demand for more capable, responsive, and programmable networks, while intensifying competition from players operating at global scale. The cost of slow or partial execution is rising, and the window to establish leadership in new growth areas is narrowing.

The next wave of opportunity is already underway. As AI reshapes how services are built, delivered and consumed, it also creates a significant opportunity for CSPs to capture new value from connectivity. Whether telecoms finally captures its full value — or watches others do so once again — will depend not on ambition, but on the choices CSPs make now about how they execute.

What this looks like in practice will differ across CSPs. Some will lead in deploying new capabilities at scale, while others will take more targeted or phased approaches aligned to their specific markets and priorities. What is consistent, however, is the direction of travel — and the growing importance of execution in determining who captures value from the opportunities ahead.

The industry has been here before. The difference this time will be whether it chooses to break the cycle.

The research makes one thing clear:

capturing the next wave of growth will depend on speed, flexibility and the ability to execute at scale. Ericsson is helping CSPs rethink how network capabilities are deployed and consumed, enabling faster experimentation and more agile paths to market. To find out how Ericsson can help your organization move faster, reduce friction and ensure you don't miss the opportunities ahead, get in touch with Ericsson to learn more.

