

Quick Answer: Top Communications Industry Insights From MWC Las Vegas 2023

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At MWC Las Vegas 2023, key themes raised by participants focus on 5G progress ready to drive growth, B2B services, AI/ML and generative AI. This research highlights top developments for CSP CIOs to keep a pulse on as they impact strategy, opportunities and challenges in the communications industry.

Quick Answer

What were the top themes at MWC Las Vegas 2023?

- B2B services won the most attention as potential drivers of 5G revenue growth, with opportunities such as fixed wireless access, IoT and connected car, security services (e.g., SASE with 5G), and private 5G for verticalization.
- Progress on 5G is poised to support growth, with CSPs highlighting their 5G coverage progress with midband spectrum and new capabilities like network slicing coming to market.
- AI/ML and GenAI were prevalent, with a focus on supporting efficiencies and automation with a breadth of use cases.
- Open RAN, security, network APIs, sustainability, spectrum and nonterrestrial networks (NTN) also garnered attention.

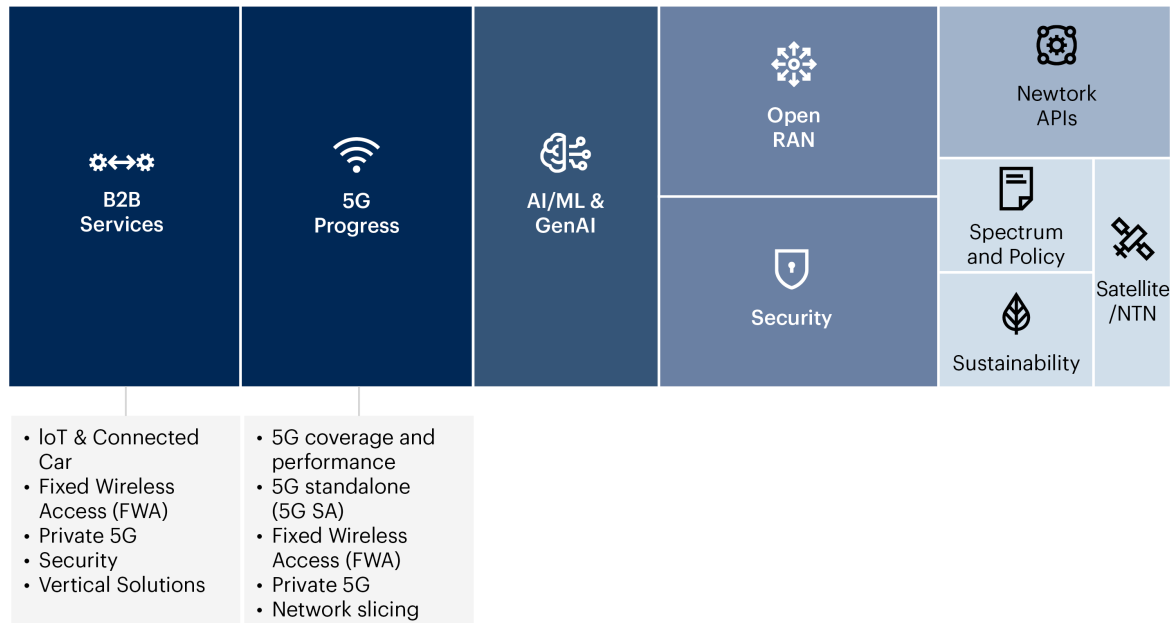
More Detail

Beyond the traditional radio access, devices and infrastructure topics, key themes of MWC Las Vegas 23 emphasized a focus on driving growth in the communications industry, as shown in Figure 1. This 2023 event also included special sessions focused on telecom network security and how to work with developers, and an IoT summit focused on energy and the environment.

Figure 1: MWC Las Vegas 23 Top Themes

MWC Las Vegas 23 Top Themes

Illustrative



Source: Gartner

Note: Relative size and shading indicates Gartner analysts' perception on the relative amount of focus on these topics across sessions, showfloor, and conversations.

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Small and midsize RAN device and network equipment vendors constituted a significant portion of the exhibitors demonstrating capabilities at the show. Nonetheless, booths from large players showcasing their new B2X services capabilities (T-Mobile, AT&T), automation tools for CSPs (Wipro, Infosys), and artificial intelligence/GenAI (IBM, AWS) drew the largest attention from the audience.

Different companies and countries also utilized MWC Las Vegas to explore market entry to the North America market, including:

- Korea, hosting number of small companies focused on avatars and VR/AR
- India, showcasing its IT and telecom product and services companies
- Romania, showcasing its IT companies and industry associations

B2B Services Focus for 5G Revenue Growth

Major U.S. CSPs, including AT&T and T-Mobile, used the MWC Las Vegas to showcase their focus areas on the showfloor and stage. Verizon did not have a booth in the exhibits, but Verizon Business Group CEO took the stage in a keynote.

AT&T used electric cars and autonomous vehicles as the main booth theme, forecasting that the move to EV will lead to a 10x increase in the need for IoT services in the near-term future, and announced expanded [partnership with Rivian](#). The focus at the event's IoT Summit was on the need to maximize the use of connectivity, data and infrastructure with 5G IoT along with Massive, LTE-M, and NB-IoT as connectivity options to support energy and environment-friendly solutions. This follows the trend also observed at MWC Barcelona earlier this year (see [Quick Answer: 3 Top Take-Aways for Managed IoT Connectivity From MWC Barcelona 2023](#)).

FWA emerged as a significant topic for new 5G revenue generation for U.S. CSPs. All mobile CSPs highlighted their FWA products and coverage for consumer and B2B customers (see [Top Growth Trends in WAN Branch Office Connectivity for 2023](#)).

Additionally, North America CSPs and systems integrators (SIs) continued to advance the market activities and prototype projects on 5G private mobile networks (PMNs), focusing on solutions for vertical industries that leverage 5G connectivity and security products such as SASE.

5G Progress on Coverage and Capabilities for Service Growth

North American CSPs highlighted their 5G coverage progress with midband spectrum and new capabilities coming to market to support new service growth, and a range of ecosystem players announced partnerships, for example:

- T-Mobile U.S. announced the launch of 5G SASE product utilizing network slicing and secure SIM capabilities, in collaboration with Versa Networks. The provider also announced its work with Boston Children's Hospital on a hybrid private and public 5G network and a beta availability of Slicing APIs for developers from the T-Mobile DevEdge program.
- Verizon discussed its progress with FWA and the value proposition of its Enterprise Intelligence portfolio, including 5G PMN linked with MEC for enterprise needs such as data sovereignty. It also noted its work with clients such as the National Football League (NFL) and VA Palo Alto Healthcare System for improving healthcare for veterans.

- KDDI and Samsung announced the formation of a 5G Global Network Slicing Alliance to accelerate the creation of new network slicing use cases.
- NTT took the stage with Schneider Electric to discuss the use of 5G PMN for smart factories.
- NTT and Qualcomm Technologies announced a partnership to scale a range of 5G devices with AI at the edge and device as a service.

AI/ML and GenAI to Support Efficiencies and Automation

While AI/ML use cases are not new for the CSPs, GenAI was highlighted as a technology that is rapidly gaining adoption. For example, [AWS](#) used the event to publish CSP statistics for GenAI adoption, reporting that 20% of the CSPs are already utilizing GenAI today and expecting adoption to grow to 50% by 2025.

GenAI use cases presented in the event included:

- Use of GenAI to improve ChatBots, aiming to improve CX and cost to serve customers.
- Use of GenAI to reduce time to market with preparation of the B2B offers and contracts.

The telecom industry ecosystem also used the event to actively promote GenAI products, for example:

- IBM and AWS showed their tools for Large Language Models (LLM) and possible applications of Telco LLM, highlighting the maturity and capability of the GenAI technologies.
- IBM showcased its enterprise GenAI solution, watsonx.ai, where it demoed use cases of GenAI for CSPs.
- Industry vendors like Ericsson introduced the GenAI and LLM capabilities in their products. They showed how they are exploring how network and telco data can be included in the GenAI models and potential network optimization use cases they anticipate will become more significant in the future.

Open RAN, Security, Network APIs, Sustainability, Spectrum, NTN

A range of other top themes at MWC Las Vegas were open RAN, security, network APIs, sustainability, spectrum and satellite.

Open RAN announcements included:

- Ericsson announced it would have open fronthaul for its cloud RAN portfolio with deployments starting in 2024; it also shared a memorandum of understanding with Telefonica for cloud RAN with SMO and rAPPs.
- NTT Docomo announced its Open RAN ecosystem experience (OREX) portfolio of services and technologies (the world's first GPU-accelerated OpenRAN deployment), working with a range of partners, including Fujitsu, NEC and Nvidia.
- U.S. Department of Defense discussed how it is funding and trialing 5G and other wireless technologies for emerging DOD digital needs, and leading additional ecosystem competition, including open RAN.

Security was represented in many levels, including:

- How to ensure internal and external telecom network security, including handling external parties trying to get access to the CSP networks. Many of the CSPs have experienced network security incidents during the past year.
- The state of the mobile security landscape, providing an overview of the security threats that are impacting the mobile landscape and how this aligns with future-vision technologies like AI and 5G.
- How to use 5G and network technologies to create more secure and new security products, including the T-Mobile launch of 5G SASE.

Network APIs and network exposure to developers to drive innovation were prominent:

- MWC Barcelona 2023 announced the GSMA Open Gateway initiative, and at MWC Las Vegas, different API use cases were highlighted, including network slicing APIs (see [Quick Answer: How Should CSPs React to the GSMA Open Gateway Initiative?](#)).
- Nokia unveiled more details about its Network as Code offering, which offers network APIs and provides a platform for CSPs, developers and enterprises to work together to access network capabilities, modeled after the GSMA/Open Gateway API initiative and CAMARA APIs for network monetization.

- MWC Las Vegas also featured a development conference aiming to attract involvement from more developers and industry verticals.

Sustainability, spectrum and satellite were featured:

- Vertical industry keynotes highlighted the significant sustainability impact that 5G, together with digitalization, can create.
- U.S. CSPs were highlighting the need for visibility on how the spectrum policy will develop.
- Nonterrestrial networks have emerged as a topic where the CSPs and satellite providers are working together with handset manufacturers. Various presentations highlighted the expanding set of use cases, especially those that involve low earth orbit satellites (LEOs) in different parts of CSP networking, including transmission, site connectivity and direct access to consumer devices.

Evidence

Gartner analysts' perspectives are based on insight gathered in attending MWC Las Vegas 2023, which is the GSMA's key event focusing on the Americas region. GSMA is a leading industry association for mobile communications providers and technology vendors worldwide. MWC Las Vegas is organized by the GSMA in partnership with CTIA, representing the U.S. wireless communications industry. The event had 8,000 attendees from 80 countries and 300 speakers. It also included 380 sponsors and partners hosting the showfloor.

Perspectives are also based on analysis of press releases and other news items related to the event.

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