

MWC 2023: consumer services were underrepresented, but there were several interesting initiatives

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At MWC 2023, consumer services received little attention. Instead, operators highlighted business services as the primary growth opportunity with the topic of [private networks being particularly popular](#). However, three interesting themes among the announcements did relate to consumers.

Firstly, operators and vendors announced plans to add satellite connectivity capabilities to their consumer propositions. Secondly, operators reinforced their existing metaverse commitments, even if the metaverse was much less prominent at MWC 2023 than at MWC [2022](#). Finally, MWC featured a number of announcements about new smartphones and home Wi-Fi customer premises equipment (CPE).

Interest in satellite connectivity was high at MWC 2023, but there were few detailed commitments from operators

Satellite connectivity initiatives were a prevalent theme for operators at MWC 2023. However, none of the related announcements included firm launch dates or details of commercial propositions, which suggests that most mass-market propositions are still some way off.

- [Deutsche Telekom](#) signed a memorandum of understanding (MoU) with the European Space Agency to develop hybrid networks that complement traditional networks using satellite connections.
- [Veon](#) announced a partnership with OneWeb, to increase 4G coverage in emerging markets. [Orange](#) also signed a similar agreement with OneWeb, the week after MWC, to expand Orange's coverage with satellite connectivity.
- [Zain](#) and [TIM](#) signed separate MoUs with AST SpaceMobile to provide connectivity to remote areas in the weeks leading up to MWC 2023.

Handset vendors also made satellite related announcements during the event.

- Smartphone vendors Honor, Motorola, Nothing, Oppo, Vivo and Xiaomi announced that they would incorporate Qualcomm's [Snapdragon Satellite chip](#), which provides connectivity with the Iridium constellation, into future smartphone models.
- Bullit, a vendor that specialises in rugged smartphones, demonstrated its [Motorola Defy Satellite Link](#), a Bluetooth device that can act as a link to satellite connectivity services for smartphones without built-in satellite capabilities.

Players have rationalised their metaverse ambitions relative to the intense hype of 2022

MWC 2023 had fewer metaverse announcements than [MWC 2022](#), which was when Meta announced two operator partnerships and there were multiple metaverse-related announcements and demonstrations from

vendors. Meta's performance over the past year, and the challenging international economic landscape, has likely lowered enthusiasm in metaverse-concepts for some players.

Nonetheless, operators with existing metaverse initiatives reinforced their commitments in this space.

- Telefónica announced that it would resell Meta Quest 2 and PICO 4 headsets in the UK, following a previous agreement to resell Meta's headsets in Spain.
- Telefónica also showcased its [Movistar Immersive Experience](#) app, which is available through Meta Quest glasses.
- [SK Telecom](#) (SKT) signed MoUs with Axiata, CelcomDigi and Deutsche Telekom to develop its Ifland metaverse platform in other countries other than South Korea. This is a continuation of SKT's efforts to expand Ifland in 80 countries, which it announced at MWC 2022.

XR and AI technologies were also demonstrated at MWC 2023. These technologies are essential components of the metaverse, as shown in [Analysys Mason's metaverse framework](#), and their presence at MWC 2023 suggests that metaverse-adjacent technologies are still focus areas, even if the term 'metaverse' is now being used less frequently by some companies.

- [Xiaomi](#) unveiled its Wireless AR Glass Discovery Edition, which uses the same chipset as Meta's Quest Pro and does not need to be tethered to a smartphone.
- Huawei showcased its AR Search function for Petal Search, which can use smartphone cameras to identify objects and translate text without taking photos.
- [XRAI Glass](#), a manufacturer of smart glasses for people who are visually or hearing impaired, incorporated OpenAI's ChatGPT technology into its glasses and app.

Vendors launched smartphones and home Wi-Fi devices at MWC 2023

Most mobile device announcements came from Chinese smartphone vendors that are looking to expand internationally and target high-income consumers with premium smartphone models. Consequently, vendors emphasised improved smartphone features such as better camera quality, rapid charging capabilities and longer battery life.

- Realme launched its [GT3 smartphone](#) with 240W charging power.
- Honor launched its [Magic V handsets](#). Honor highlighted the Magic V's advanced camera and longer battery life features.
- Xiaomi released its flagship [Xiaomi 13 Pro](#) smartphone internationally, which includes advanced camera and 120W charging capabilities.
- Tecno launched its [Phantom V Fold](#) foldable smartphone.

Only two vendors made announcements relating to eSIM/iSIM for smartphones and no details were given on when consumer propositions would be launched.

- Qualcomm announced that its [Snapdragon Gen 2 Mobile Platform](#) chipset had iSIM capabilities that were certified by the GSMA.
- Google stated that it would incorporate an eSIM transfer feature into Android devices in 2023, but gave no further detail on the timescale.

Customer premises equipment (CPE) for home Wi-Fi was an important theme in device announcements. This reflects an increased interest in CPE among vendors and operators. As gigabit-capable broadband tariffs become more common, further improvements to customer experience are limited by existing home Wi-Fi equipment. As a result, vendors emphasised high throughput and pre-release Wi-Fi 7 compatibility in their device launches.

- Huawei unveiled the [OptiXstar F30 FTTR](#) solution, which aims to provide a 2Gbit/s connection throughout the home.
- Nokia launched its [Beacon 10](#), which supports Wi-Fi 6E and can provide throughput of 10Gbit/s.
- Xiaomi unveiled its BE7000 pre-release Wi-Fi 7 router.
- ZTE also launched its [5G FWA Wi-Fi](#) router that supports pre-release Wi-Fi 7.

Consumer services' share of announcements at MWC 2023 was not proportional to consumers' share of global telecoms revenue (which is around 80% of total revenue). Key trends relating to consumer services, such as eSIM devices and price increases, received little attention from operators. The announcements that did relate to consumer services tended to be high-level and did not include concrete commitments. For example, operator announcements relating to satellite connectivity were mostly MoUs that did not include details on commercial propositions. The metaverse also featured in operator announcements, but these tended to be continuations of previous commitments rather than new initiatives. The announcements that were most relevant to consumers were device launches from vendors, rather than operator-led initiatives. Nonetheless, it is possible that this is a cyclical issue. Next year, there should be more attention on consumer services, including the fleshing out of some of the topics, such as satellite connectivity and eSIM, that were popular this year.