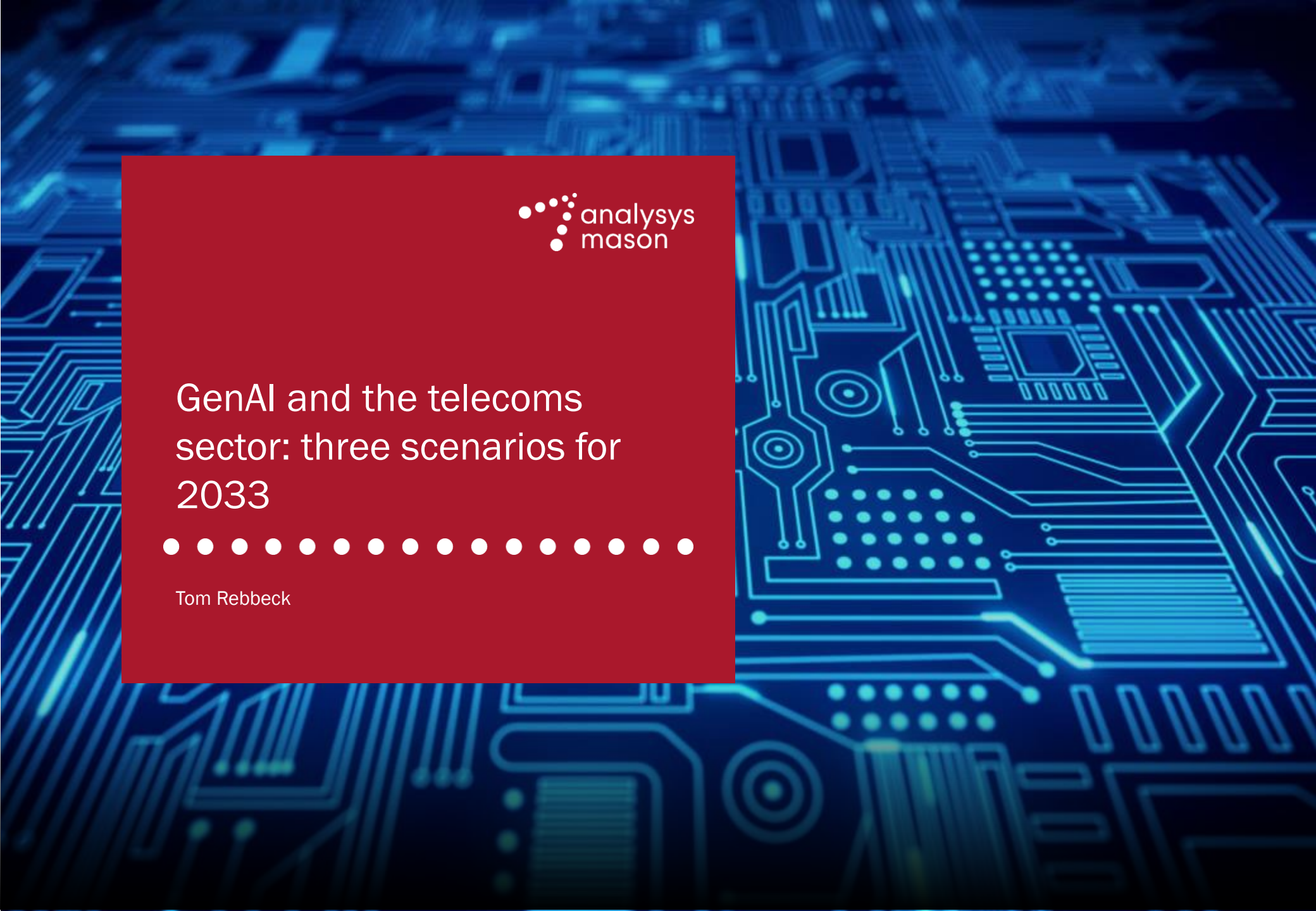

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GenAI and the telecoms sector: three scenarios for 2033

Tom Rebbeck

About this report

This report explores how generative artificial intelligence (GenAI) could impact the telecoms industry. It describes three distinct scenarios for the future of the telecoms industry in 2033. The impact of GenAI on the telecoms industry will vary in each scenario, as will the opportunities and threats that this technology presents to operators and vendors.

The report is intended to provide an initial framework for how telecoms operators and vendors think about, and respond to, GenAI. It explores the potential impact of GenAI on the structure of the sector as a whole and its impact on individual functions within telecoms operators' businesses.

The report should be of value for all parties interested in the future of the telecoms industry, but it provides specific recommendations for telecoms operators and vendors.

The fundamental ideas developed in this report were first presented at a workshop attended by members of Analysys Mason's research and consulting divisions. We have also read a range of secondary research reports on GenAI, some of which relate directly to telecoms but most of which explore the evolving impact of GenAI more widely.

No part of this report was written by GenAI, though we did use GenAI tools to assist in the research.

KEY QUESTIONS ANSWERED IN THIS REPORT

- How will GenAI impact the telecoms industry?
- How will that impact affect the services, functional areas and the structure of the telecoms industry?
- How should different players in the telecoms industry respond to GenAI?

WHO SHOULD READ THIS REPORT

- Strategy teams in telecoms operators, telecoms vendors, regulators and other parties interested in future developments in the sector.

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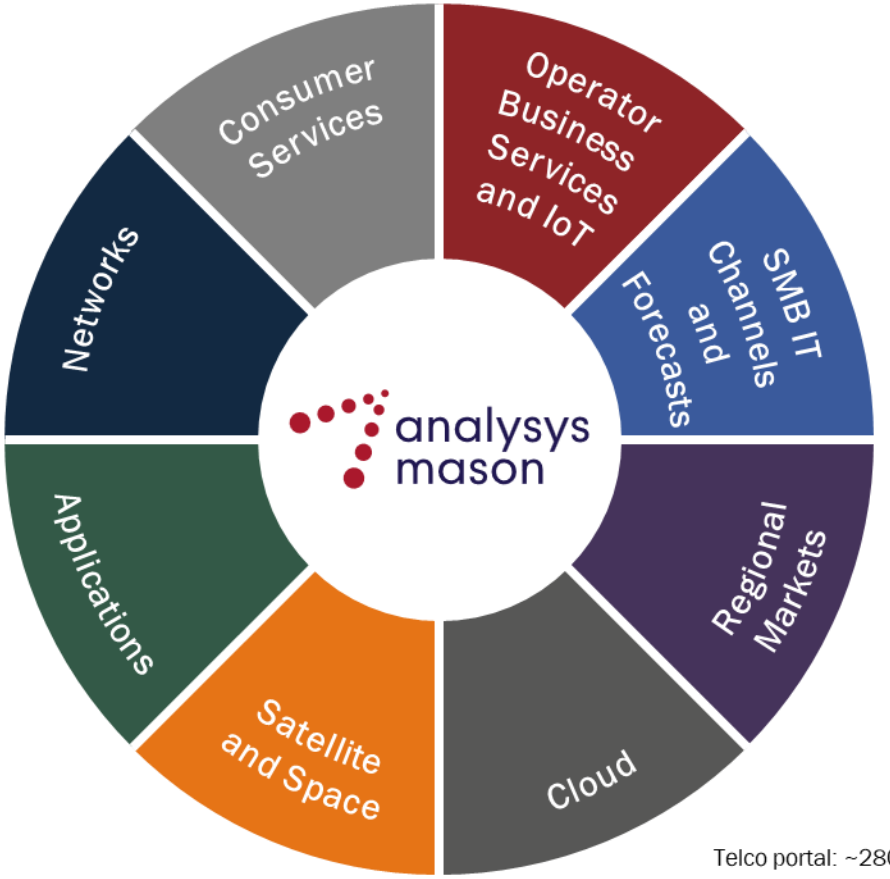

Operator Business Services and IoT
Enterprise Services
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IoT Services
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Cyber Security

SMB IT Channels and Forecasts
SMB Technology Forecaster

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Data, AI and Development Platforms
Edge and Media Platforms
Multi-Cloud Networking

DataHub
Forecast data for 80 countries
Telco portal: ~2800 forecast and ~320 historical metrics
SMB Technology Forecaster portal: ~120 000 forecast metrics

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