



Top 10 Telecoms & Connectivity Trends 2026

Why Read Our Top 10 Telecoms Trends Report

Juniper Research's Top 10 Telecoms Trends Report provides strategic insights for industry stakeholders, including network operators, technology vendors, and investors; highlighting the most impactful emerging trends and market opportunities shaping the telecommunications landscape in 2026. Juniper Research prides itself on identifying and analysing the most disruptive trends in telecoms and connectivity; helping industry stakeholders navigate this evolving landscape.

With technologies such as AI agents and Rich Communication Services Business Messaging (RBM) reaching a stage of commercial readiness, 2026 is expected to mark a strategic shift towards the development of scalable, enterprise-grade solutions. There will be a growing emphasis on fraud prevention to address emerging security risks and new attack vectors. Additionally, improving consumer experiences will be a key focus next year; aimed at driving adoption and enhancing customer retention across mobile services.

The industry is approaching an unprecedented inflection point, with more new entrants than ever before reshaping the competitive landscape. As a result, the traditional role of mobile operators is at risk of diminishing. In 2026, we can expect operators to actively defend their role in connectivity, while emerging players continue to gain traction by aligning with evolving consumer and enterprise demands.

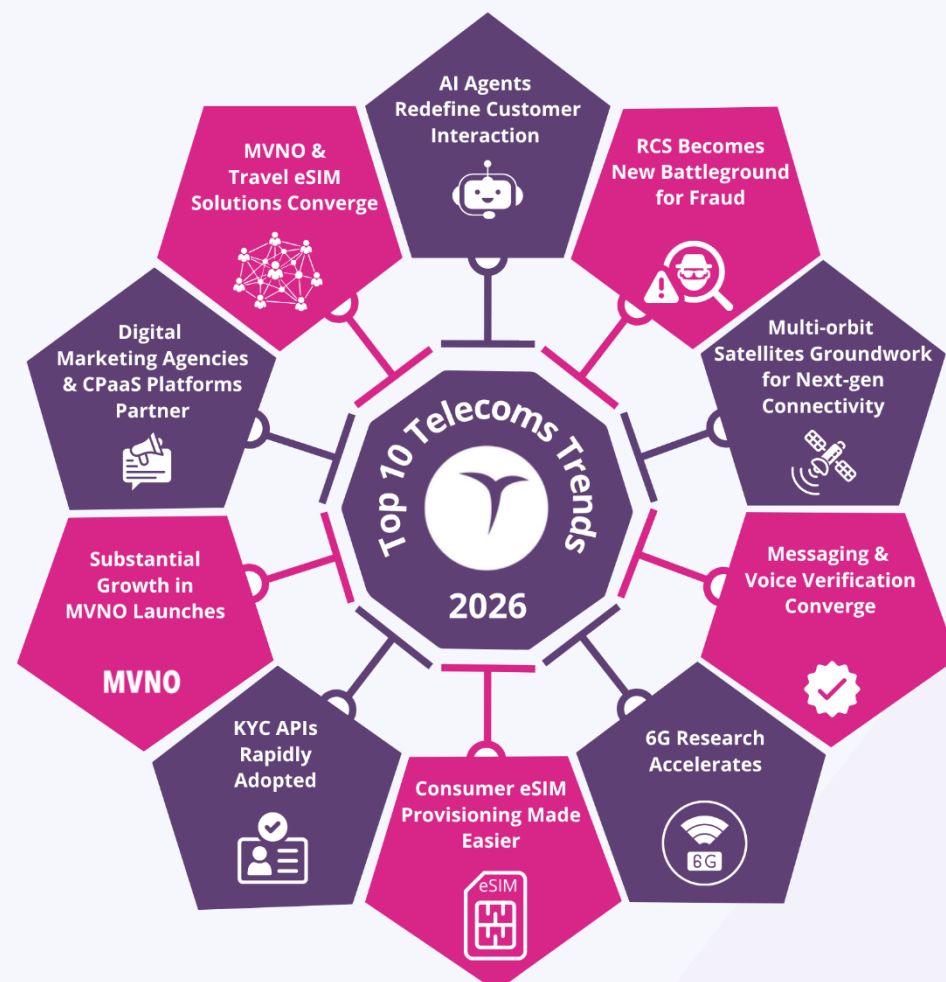
About the Trends

The following trends are presented in descending order of influence, with number 1 representing the most impactful and number 10 the least. These trends reflect Juniper Research's in-depth analysis of technologies and services across the telecommunications sector. We have identified what we believe to be the most significant developments to watch in 2026. This report covers key areas including messaging, communication services, and networks and connectivity; ensuring relevance and value for all stakeholders across the telecommunications industry.

If you would like more information about the markets being discussed, where relevant, we have provided direct links to our supplementary research reports.

You can also contact us via email at info@juniperresearch.com, where we can provide additional information and answer any questions you may have.

In this whitepaper, we will go through trends from 1 to 10. Our first trend for 2026 is on the following page.



1. AI Agents Will Redefine Customer Interaction at Scale

AI agents are enabling the automation of tasks within customer interactions; connecting to tools and data sources to complete multi-step objectives. AI agents are becoming modular, composable components that are integrated with communication platforms, including Communications Platform-as-a-Service (CPaaS), Contact Centre-as-a-Service (CCaaS), and Customer Relationship Management (CRM) platforms; allowing these platforms to offer an additional layer of automation within customer communications.

In 2026, Juniper Research anticipates a scaling of commercial AI agent launches for customer support use cases; allowing for greater automation of customer interactions. AI agents for customer support use cases will be the first to be scaled within customer communications; these use cases are easy to identify and offer clearer return on investment compared with other applications of AI agents within the communications space.

A key driver of this is the Model Context Protocol (MCP), created by Anthropic in November 2024, which has enabled standardisation of the way that AI agents interact with external tools and data sources. This has eliminated the need to create custom integrations for each tool and data source with which an enterprise wants their AI agent to interact.

In 2025, Juniper Research has observed a range of vendors launching support for MCP, and this will make it easier for AI agents to be integrated with tools and data sources. In turn, we expect more rapid development of AI agents that handle different tasks as well as the building out of multi-agent ecosystems.

Moreover, the open-source Agent2Agent (A2A) protocol, introduced by Google in April 2025, has been another key driver of this market. This protocol solves the challenge of fragmentation; allowing agents from different vendors to collaborate. Thus, enterprises can select the best AI agent for each task. This will be key with the move towards lightweight models for specific use cases, or AI agents that are optimised

to perform different tasks. Thus, the A2A protocol will make it easier for enterprises to scale multi-agent systems and implement these for customer interactions.

Over the last 12 months, CPaaS providers have been pushing their solutions to become increasingly targeted towards customer engagement; pivoting towards Customer Experience platforms. With the introduction of AI agents, Juniper Research anticipates that enterprises will look to unify communications through one platform to manage AI guardrails and security centrally. CPaaS platforms must prioritise simplifying the integration for enterprises by providing pre-configured AI agents tailored to specific use cases, and enabling their incorporation into existing communications workflows.

Juniper Research anticipates that customer support AI agents will primarily be scaled within enterprise websites and apps initially, given these are typical channels where customers will reach out for this support.

Thus, the leading communications platforms will not only be looking to offer multiple agents to automate tasks across customer support use cases, but will also be looking at the implementation of AI agents for marketing and conversational commerce use cases. These use cases have the potential to offer higher margins, since they are more likely to be integrated across rich media messaging channels.

There are emerging monetisation models for AI agents that are workable for customer communications. Among these, pay-per-usage and outcome-based models are expected to dominate as the main business models for AI agents in 2026. Juniper Research believes a pay-per-usage monetisation model will enable predictability of enterprise spend with AI agents, and will be key to scaling their implementation in communications in 2026.



AI Agents Will Redefine Customer Interaction at Scale



MVNOs and Travel eSIMs Converge to Serve the Global Roamer



RCS Business Messaging Becomes Major Battleground for Fraud



Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms



Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity



Messaging and Voice Verification Begin to Converge for Enterprise Security



Substantial Growth in MVNO Launches Across Various Industries



6G Research Accelerates with Focus on Terahertz Spectrum Innovation



KYC APIs See Rapid Adoption Across Digital Services in 2026



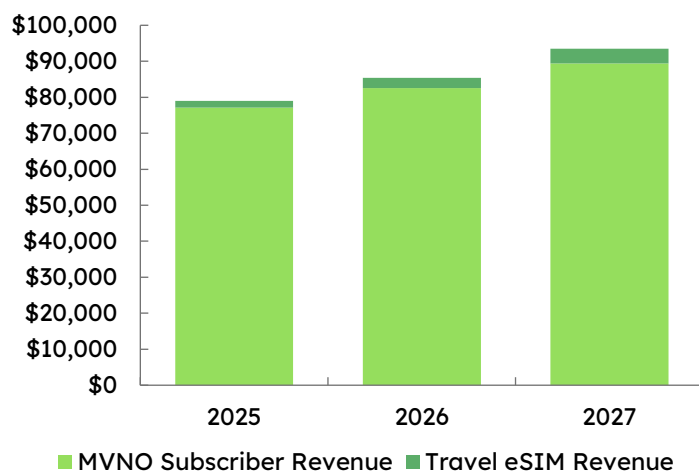
Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

2. MVNOs and Travel eSIMs Converge to Serve the Global Roamer

Travel embedded SIMs (eSIMs) are prepaid packages for international connectivity; providing an alternative to traditional roaming solutions. Growth in this market is accelerating due to the Connectivity-as-a-Service (CaaS) model, where travel eSIM enablers are providing enterprises and operators with the tools to sell travel eSIM packages to customers.

While the travel eSIM market is growing, the size of the market still pales in comparison to the size of the Mobile Virtual Network Operator (MVNO) market in 2025. This market is also being driven by the CaaS model, with MVNO-in-a-Box providers enabling businesses to quickly set up their own MVNO. The challenge within the travel eSIM market, going forward, will be the lack of recurring revenue businesses are guaranteed to secure; whereas MVNOs will receive recurring revenue through a subscription-based model.

Total Revenue from MVNO and Travel eSIMs (\$m), 2025-2027



Source: Juniper Research

This means that vendors have to offer a strong customer experience, as well as bundled services for additional value, to ensure they can retain and grow their customer bases. Even if this is achieved, there will still be unpredictability with travel eSIMs, given the seasonality of the travel industry and these being prepaid, one-off purchases.

In comparison, revenue from MVNO services is more predictable. Therefore, those looking to enter the mobile market are more likely to opt for this solution rather than travel eSIMs. If market entrants are using an MVNO-in-a-Box provider which also offers travel eSIM enablement, then they will be more likely to opt for this. As a result, Juniper Research anticipates these enablers will offer combined enablement solutions going forward; providing a single, white-label solution which allows customers to manage their domestic and travel plans in one app.

Juniper Research expects eSIM technology to evolve to allow consumers to add global connectivity to an existing eSIM. In turn, Juniper Research anticipates that customers will be able to install a travel eSIM just once, and top-up connectivity when required. By enabling a one-time installation of a travel eSIM, this makes it easier for a customer while encouraging repeat purchases from the same provider.

Juniper Research expects robust Know Your Customer (KYC) functionality to be implemented. Since KYC functionality is also a requirement for MVNO services, providers will already be familiar with this offering, and services will be included within MVNO-in-a-Box solutions. In turn, this will make it easier for customers to purchase travel eSIMs from their existing MVNO provider.

In 2026, businesses seeking to enter the telecoms market will offer both solutions together; with MVNO services providing the recurring revenue and travel eSIMs providing an additional revenue stream. This will be enabled by the CaaS model, where MVNO-in-a-Box and travel eSIM enablement will become one solution.



AI Agents Will Redefine Customer Interaction at Scale



MVNOs and Travel eSIMs Converge to Serve the Global Roamer



RCS Business Messaging Becomes Major Battleground for Fraud



Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms



Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity



Messaging and Voice Verification Begin to Converge for Enterprise Security



MVNO

Substantial Growth in MVNO Launches Across Various Industries



6G Research Accelerates with Focus on Terahertz Spectrum Innovation



KYC APIs See Rapid Adoption Across Digital Services in 2026



Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

3. RCS Business Messaging Becomes Major Battleground for Fraud

In 2026, bad actors will have a larger pool of potential victims from which they can generate fraudulent income. Owing to the rich capabilities in RBM, fraud over the channel will also introduce new types of fraud not seen over SMS.

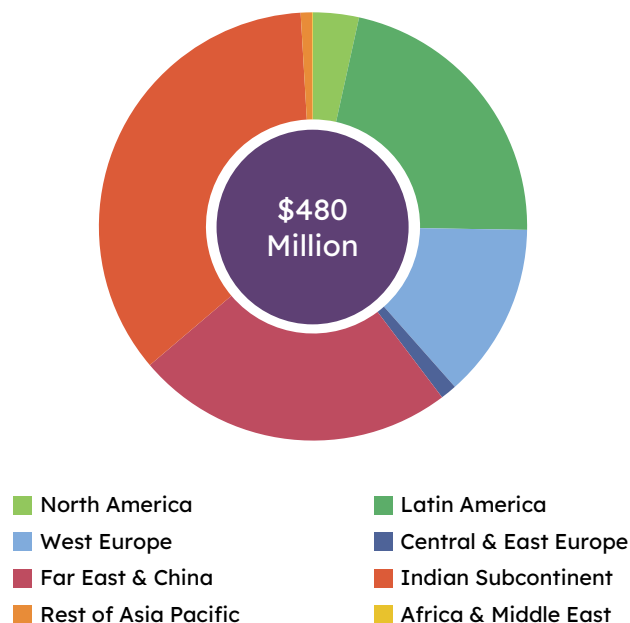
Some examples of the new types of fraud that will appear over RCS include group chat or conversational spam, also known as *pig butchering*, which can be used with AI to bolster the sophistication of attacks. Images can also be used to hide QR codes or malicious links; making it harder for traditional SMS firewalls to detect fraudulent messages.

To combat the rising threat of fraud over RCS, Mobile Network Operators (MNOs), operators, and fraud prevention vendors must develop fraud detection capabilities specific to RBM and implement protection tailored to rich messaging. This must include robust sender verification, real-time fraud detection, and AI-driven behavioural analytics. Juniper Research believes that collaboration with aggregators and brands is essential to monitor message integrity.

Operators and enterprises must also educate users on identifying suspicious RCS messages and enforce strict onboarding for business senders. As RCS adoption accelerates, proactive investment in fraud prevention will be critical to protect subscribers and preserve trust in the channel.

As with SMS, fraudulent activity on RCS will predominantly adversely affect MNOs, enterprises, and mobile subscribers. Of these three, mobile subscribers are still most at risk and will be disproportionately impacted. As can be seen below, while RCS is still considered an emerging technology, Juniper Research estimates that subscribers will lose nearly \$500 million to scams in 2026.

Subscriber Losses to Fraud Over RCS in 2026: \$480 million, Split by 8 Key Regions



Source: Juniper Research

Juniper Research believes that the end-to-end encryption (E2EE) over RCS - which prevents messages from being inspected for malware, phishing, or malicious in transit - is the biggest challenge to combatting fraud over the channel.

Juniper Research suggests MNOs and enterprises focus particular attention on unusual metadata, using AI and ML to detect atypical behaviour indicative of fraud and examine the length of time the mobile number from which the message originated has been active.



AI Agents Will Redefine Customer Interaction at Scale



MVNOs and Travel eSIMs Converge to Serve the Global Roamer



RCS Business Messaging Becomes Major Battleground for Fraud



Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms



Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity



Messaging and Voice Verification Begin to Converge for Enterprise Security



Substantial Growth in MVNO Launches Across Various Industries



6G Research Accelerates with Focus on Terahertz Spectrum Innovation



KYC APIs See Rapid Adoption Across Digital Services in 2026



Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

4. Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms

CPaaS platforms continue to innovate as they seek to capitalise on the changing demand from enterprises for outbound communication. The demand for SMS business messaging continues to decline owing to price increases and high levels of fraud.

However, CPaaS platforms are increasingly onboarding enterprises for marketing use cases. New customers are often adopting CPaaS solutions for use cases including marketing and advertising; a contrast to authentication traffic, such as one-time passwords (OTPs). CPaaS platforms have been deploying solutions which meet the demand for these marketing use cases.

CPaaS platforms have two options:

- Develop marketing solutions that align with their omnichannel communications platforms in-house.
- Partner with established digital marketing agencies (DMAs) which already have the necessary experience in the marketing ecosystem.

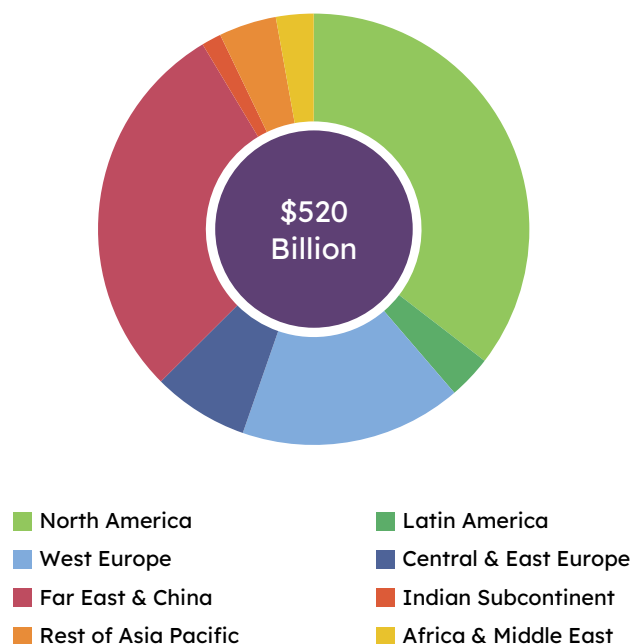
Given the fast-paced nature of CPaaS today, we expect partnerships to be the prevailing method owing to the reduced time-to-market it enables, with many partnerships announced in 2026. Additionally, the marketing ecosystem is complex and highly varied, including brand recognition strategies, marketing content creation, and paid-for digital advertising.

CPaaS players are undergoing a rapid transformation; leading players are pivoting services to focus increasingly on marketing-focused services that often include AI. This shift perfectly aligns with goals of further integrating themselves within the digital advertising ecosystem; Juniper Research believes that partnerships with established ecosystem players will accelerate this integration in 2026.

However, the extent of these partnerships will vary; Juniper Research believes that the first substantial partnerships will occur in North America and Europe owing to the high digital advertising spend in these regions.

CPaaS players have increasingly shifted towards platforms that provide more than just the connectivity pipelines for outbound communication. Whilst we do not expect CPaaS platforms to become marketing agencies outright, the ability to benefit from DMAs' capabilities will provide CPaaS platforms with a highly valuable service proposition to the highest spending clients.

Digital Ad Spend in 2026: \$520bn, Split by 8 Key Regions



Source: Juniper Research



AI Agents Will Redefine Customer Interaction at Scale



MVNOs and Travel eSIMs Converge to Serve the Global Roamer



RCS Business Messaging Becomes Major Battleground for Fraud



Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms



Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity



Messaging and Voice Verification Begin to Converge for Enterprise Security



Substantial Growth in MVNO Launches Across Various Industries



6G Research Accelerates with Focus on Terahertz Spectrum Innovation



KYC APIs See Rapid Adoption Across Digital Services in 2026

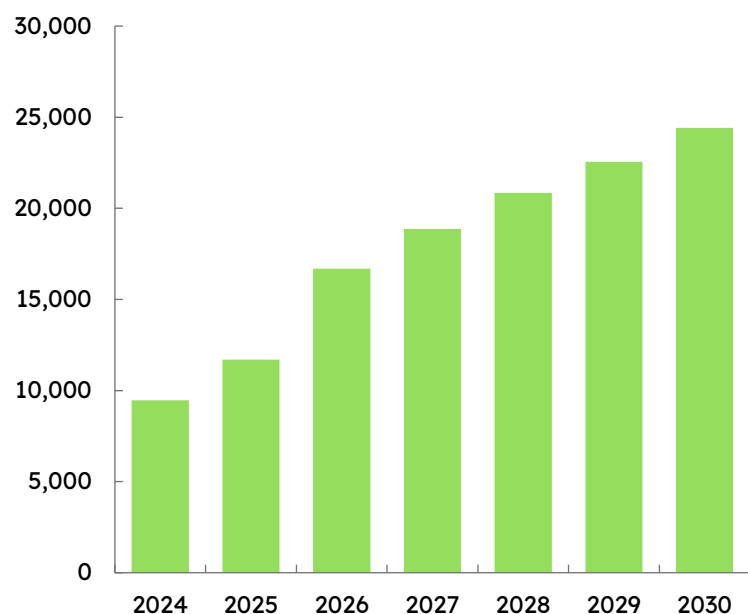


Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

5. Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity

Satellite networks, or non-terrestrial networks (NTNs), are quickly becoming important to the future of connectivity; Juniper Research forecasts the number of satellites in operation to reach almost 12,000 by the end of 2025.

Total Number of Satellites, 2024-2030



Source: Juniper Research

The expansion of satellite constellations shows no sign of slowing, with Starlink having filed a request with the Federal Communications Commission (FCC) in September 2025 to launch up to 15,000 satellites, three Chinese satellite providers each having plans for constellations of more than 10,000 satellites, and Amazon Project Kuiper planning to launch more

than 3,000 satellites by July 2029. This is not to mention the continuous investment by incumbent satellite providers, such as Viasat and Eutelsat, as well as OneWeb.

Most of these satellites will be deployed in Low Earth Orbit (LEO), with LEO accounting for over 97% of the satellites deployed in 2030. LEO satellites have emerged as key enablers of services such as direct-to-cell and satellite broadband, with their low latency and higher data speeds allowing satellite providers to offer new services. This is particularly true in the consumer segment, where LEO satellites have played a crucial role in expanding services such as fixed satellite broadband and direct-to-consumer services.

While LEO has dominated much of NTN discussions, Juniper Research believes that, through 2026, satellite providers will increasingly focus their strategies on the integration of satellites across different orbits. These multi-orbit strategies enable the users of NTNs to benefit from the advantages provided by each orbit, with services being optimised based on the needs of the applications. This flexible and dynamic use of network resources will lay the groundwork for next-generation connectivity services; enabling applications to leverage not only terrestrial networks and NTNs, but also different orbits from a single provider.

Critically, multi-orbit NTNs can leverage various orbits to improve the resiliency of the solutions and services that are delivered to enterprises, governments, and consumers. With many applications for NTNs being mission-critical, these improvements to resiliency will be key to ensuring that NTNs can grow in importance to global connectivity markets and strategies over the next five years; with the next year laying the groundwork for these advanced services.

These advanced services will be essential to satellite providers competing in an increasingly competitive satellite market; one that will see Amazon Project Kuiper enter in 2026.



AI Agents Will Redefine Customer Interaction at Scale



MVNOs and Travel eSIMs Converge to Serve the Global Roamer



RCS Business Messaging Becomes Major Battleground for Fraud



Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms



Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity



Messaging and Voice Verification Begin to Converge for Enterprise Security



Substantial Growth in MVNO Launches Across Various Industries



6G Research Accelerates with Focus on Terahertz Spectrum Innovation



KYC APIs See Rapid Adoption Across Digital Services in 2026



Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

6. Messaging and Voice Verification Begin to Converge for Enterprise Security

To fully benefit from B2C communications, Juniper Research believes that enterprise verification procedures are essential. Enterprise verification validates the identity of the originator of the communication; ensuring that a recipient is confident of the legitimacy of the sender. This is notable for the voice channel and RBM, in which the value of enterprise use relies upon consumer trust in the communication.

The value of verification cannot be understated; most notably, the ability to fight fraud, such as account takeover fraud (ATO), committed over telecoms channels.

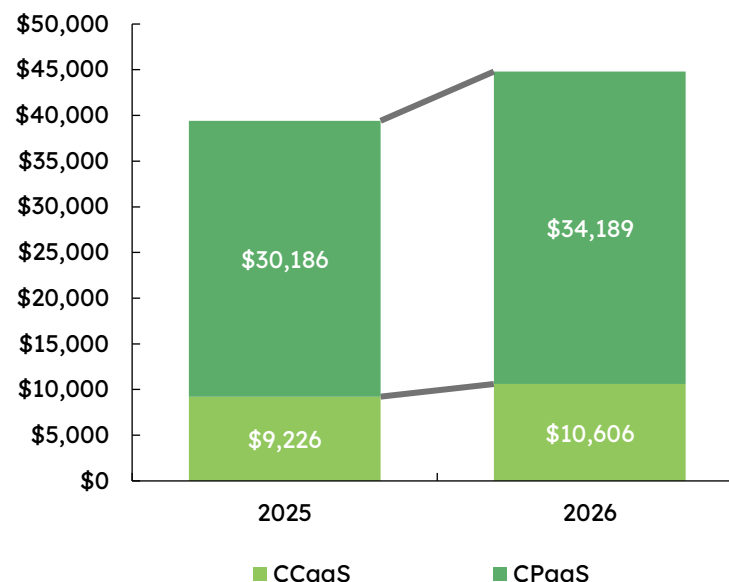
Although current enterprise verification processes are established and streamlined, Juniper Research notes that these processes must be completed across various technologies, network operators, and geographic regions. In turn, enterprises may be dissuaded from undertaking the verification process; diminishing the potential impact of mass market adoption.

We expect the convergence of these enterprise verification processes to accelerate in 2026, with initial frameworks focusing on making enterprise verification across channels seamless, but retaining accuracy of verification remains essential.

However, there is a confluence of factors that will impact the development of these new frameworks. At present, enterprise verification for messaging is primarily focused on RBM, involving CPaaS vendors such as Infobip, Telesign, Sinch, and Twilio, who are developing in-house solutions over their own platforms for outbound communication. Similarly, Branded Calling ecosystem enablers, such as Hiya, TNS, and TransUnion, have developed tools for Branded Calling that require enterprise verification. These vendors must work with CCaaS platforms which originate voice calls that required

Branded Calling. Shown below is the spend over CCaaS and CPaaS platforms in 2025 and 2026; a notable increase in both.

CCaaS and CPaaS Spend (\$m), 2025 & 2026



Source: Juniper Research

Juniper Research believes that there will be increased collaboration between these two types of vendors, who have, historically, not co-operated to any significant degree.

Notably, Juniper Research believes that the development of these frameworks must not sacrifice any validity of enterprise verification to increase the ease for the process itself. At present, we note that the verification process for Branded Calling takes between five and 10 days; with enterprises reporting that this is sufficient.



AI Agents Will Redefine Customer Interaction at Scale



MVNOs and Travel eSIMs Converge to Serve the Global Roamer



RCS Business Messaging Becomes Major Battleground for Fraud



Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms



Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity



Messaging and Voice Verification Begin to Converge for Enterprise Security



MVNO

Substantial Growth in MVNO Launches Across Various Industries



6G Research Accelerates with Focus on Terahertz Spectrum Innovation



KYC APIs See Rapid Adoption Across Digital Services in 2026



Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

7. Substantial Growth in MVNO Launches Across Various Industries

The MVNO market has been thriving and is growing, with MVNOs playing a key role in mobile markets worldwide. Whilst the success of MVNOs is a key reason why non-traditional mobile services companies are launching MVNOs, Juniper Research believes that the emergence of Telecommunications-as-a-Service (TaaS) and MVNO-in-a-Box are also crucial.

The models offer enterprises a scalable and simplified approach to launching MVNOs; eliminating long-term commitments and high upfront costs associated with entering the MVNO market. This means that entering the MVNO market is both more affordable and carries reduced risk for enterprises.

Moreover, TaaS solutions also provide a streamlined approach, with MVNOs which can be launched in just weeks using a single platform or solution. This dramatically simplifies entry into mobile services markets, especially for enterprises which lack existing experience in the mobile services sector.

Juniper Research believes that the development of TaaS solutions has been critical to the growth in fintech MVNOs being launched recently. Late last year, Nubank launched an MVNO in Brazil, and, more recently, other major fintech players such as Revolut and Klarna have launched their own MVNOs.

The TaaS model is a key enabler of these MVNO launches, as it provides the flexibility for fintechs to move quickly and have a streamlined entry into mobile services markets.

In 2026, Juniper Research expects other non-traditional industries, such as sports teams, charities, and retailers, to also see significant growth in the number of MVNOs launched. The TaaS business model will be critical to enabling these launches, not only because it streamlines and simplifies the launch and operation of an MVNO, but because its flexibility allows smaller and more niche MVNOs.

While, historically, the need to buy large volumes of wholesale capacity forced MVNOs to compete nationally and on price comparison sites, the TaaS business model allows for smaller MVNOs to launch and operate profitably. Juniper Research believes that these more niche MVNOs will accelerate over the next year, with large numbers of launches.

Juniper Research expects that charities, sports teams, and other non-traditional mobile service industries will launch MVNO services as part of their existing customer and membership ecosystems. While offering a new direct revenue source, the key motivation behind these MVNOs will be to increase customer loyalty and create revenue uplift. For charities, profits are used to support causes and retain donors in the long run.

To successfully meet demand for these services, Juniper Research believes TaaS providers need to work with enterprises to identify how the addition of MVNO services can benefit their core business, as well as providing significant automation and scalability that ensures smaller MVNOs can be launched and operated efficiently and effectively.



AI Agents Will Redefine Customer Interaction at Scale



MVNOs and Travel eSIMs Converge to Serve the Global Roamer



RCS Business Messaging Becomes Major Battleground for Fraud



Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms



Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity



Messaging and Voice Verification Begin to Converge for Enterprise Security



Substantial Growth in MVNO Launches Across Various Industries



6G Research Accelerates with Focus on Terahertz Spectrum Innovation



KYC APIs See Rapid Adoption Across Digital Services in 2026



Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

2026

The International Telecommunication Union (ITU) will work towards its IMT-2030 framework, outlining performance requirements and future use cases.

2027

3GPP will finalise Release 21 and 22, setting the foundation for 6G's architecture. Key technologies, such as terahertz spectrum and AI-native orchestration, will be tested.

2028

Governments and industry leaders will begin pilot deployments in controlled environments like smart campuses, ports, and industrial zones, in a similar fashion to private networks.

2029

Operators and vendors will begin pre-commercial 6G deployments. However, Juniper Research warns that market stakeholders must not focus on a single use case.

2030

The first commercial 6G services are expected to be deployed in 2030. These networks will offer 1 Tbps speeds, sub-millisecond latency, and AI-driven automation.

8.6G Research Accelerates with Focus on Terahertz Spectrum Innovation

Despite the ongoing development of new 5G technologies, Juniper Research expects operators to focus on the development of 6G networks in 2026. We believe that the formation of initial standards must prioritise revenue generation strategies during technological standards discussions. Operators failed to monetise 5G services, most notably in comparison to the high expectations during the development and testing of the technology. This approach, which focused on targeting 5G services towards a 'killer app' to generate additional revenue, was not successful; leaving the deployment of the technology too rigid across the various use cases.

Juniper Research believes that this approach contributed to the lower-than-expected monetisation of 5G services. We believe that this mistake must be avoided for the development of 6G. The technology must be able to be deployed in a modular fashion to suit the various use cases for which 6G can be used. Operators risk reducing their role in the connectivity market to a mere connectivity pipeline. 5G represented a substantial technological advancement over 4G networks; however, many enterprises lacked the expertise to deploy it efficiently. Operators must ensure that 6G standards do not just simply focus on more throughput and lower latency, but focus on adaptability and efficiency.

However, as operators balance the need for increased monetisation with the need for efficiency, Juniper Research believes that the Terahertz spectrum will be required owing to its ultra-high throughput rates, precision in location-based services, and better spectrum efficiency.

Essentially, Juniper Research believes that when developing 6G networks, the market must not focus on making network speeds faster, but on efficiency and modularity. This will position operators to benefit from emerging monetisation models, notably usage-based pricing of networks.



AI Agents Will Redefine Customer Interaction at Scale



MVNOs and Travel eSIMs Converge to Serve the Global Roamer



RCS Business Messaging Becomes Major Battleground for Fraud



Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms



Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity



Messaging and Voice Verification Begin to Converge for Enterprise Security



MVNO

Substantial Growth in MVNO Launches Across Various Industries



6G Research Accelerates with Focus on Terahertz Spectrum Innovation



KYC APIs See Rapid Adoption Across Digital Services in 2026



Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

9. KYC APIs See Rapid Adoption Across Digital Services in 2026

The launch of open network APIs or CAMARA APIs has attracted significant attention from mobile network operators and vendors, with the initiative providing an opportunity to diversify revenue and introduce new business models and services.

Juniper Research believes that over the next year the network API market will grow substantially, with revenue growing from \$283 million in 2025 to more than \$600 million in 2026.

This substantial 127% increase in revenue will be driven by mobile identity use cases, which are currently dominated by SIM Swap and Number Verification APIs. Juniper Research believes that over the next year, leading mobile network operators will build on their foundation of SIM Swap and Number Verification APIs by launching Know Your Customer APIs.

CAMARA provides four APIs for KYC:

- KYC Age Verification
- KYC Fill In
- KYC Match
- KYC Tenure

Mobile network operators in leading markets, such as the UK, have already launched KYC capabilities, and others will follow over the next year.

By adding KYC services to their mobile identity services, mobile network operators will be able to provide enterprises with a more comprehensive collection of mobile identity services.

Juniper Research believes that a major early opportunity for KYC API monetisation will be Age Verification APIs.

Governments around the world are increasingly seeking to implement stricter age restrictions to protect minors online. For example, the UK and US states such as Texas have implemented restrictions on adult content and other age-sensitive services.

The major opportunities for the monetisation of Age Verification API will be market verticals such as online gambling and adult content, which are frequent targets of legislation and regulations by governments. Another key market vertical will be eCommerce companies providing age-restricted goods such as alcohol.

Juniper Research believes that the opportunity for KYC APIs must not be distilled down to the age verification opportunity. There are significant opportunities beyond age verification for monetisation of KYC services.

This is especially true in market verticals such as banking and financial services, where mobile networks and channel partners are already seeing success in monetising network APIs. Juniper Research recommends that stakeholders leverage their existing presence and relationships through number verification and SIM swap APIs, as a platform for KYC API growth over the next year.



AI Agents Will Redefine Customer Interaction at Scale



MVNOs and Travel eSIMs Converge to Serve the Global Roamer



RCS Business Messaging Becomes Major Battleground for Fraud



Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms



Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity



Messaging and Voice Verification Begin to Converge for Enterprise Security



Substantial Growth in MVNO Launches Across Various Industries



6G Research Accelerates with Focus on Terahertz Spectrum Innovation



KYC APIs See Rapid Adoption Across Digital Services in 2026



Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

10. Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

Apple's shift to eSIM-only iPhones has major implications for operators, especially in countries with limited or no eSIM operator support but high iOS penetration. Without robust digital onboarding, customers may face delays or frustration activating their devices; increasing the risk of churn.

Apple's move pushes operators to modernise quickly; investing in remote provisioning and self-service platforms to stay competitive. Smaller carriers may struggle, while global eSIM providers gain traction.

At the same time, eSIMs reduce switching friction; weakening operator control and loyalty. However, forward-thinking operators can seize the opportunity by offering bundled services, travel eSIMs, and enhanced digital experiences. Apple's decision accelerates the shift toward digital-first telecom models; making eSIM readiness a strategic priority for operators aiming to retain high-value customers and remain relevant in a rapidly evolving mobile landscape.

This progress is highlighted by recent moves from companies such as Deutsche Telekom, which have enabled seamless eSIM transfers between Android and iPhone for consumers; demonstrating a move toward cross-platform convenience.

However, it is likely to take several years before Apple and other Original Equipment Manufacturers (OEMs) make their smartphone line-ups eSIM-only worldwide. While vendors stand to benefit from eSIM technology being implemented across their devices, such as by having more space within the device for a larger battery and enabling easier device switching for consumers, some large markets are still not prepared for a switch to eSIM-only smartphones. OEMs will wait until such markets are ready to avoid any loss of sales in these countries.

This is most prominent in mainland China, where government regulations require real-name registration and major carriers have only just supported eSIMs. Other countries such as India and the United Arab Emirates have also historically experienced low or restricted eSIM adoption; often tied to regulatory hurdles and a strong reliance on physical SIMs, though this is expected to diminish.

A further barrier to wider eSIM adoption is consumer awareness. Many users, especially outside the US, opt for physical SIMs over eSIMs for several reasons, including familiarity with physical SIMs and a limited understanding of eSIMs.

Juniper Research recommends involvement from both operators and OEMs to remedy the lack of consumer awareness. Operators must educate their customers on what eSIMs are, the activation process, and how the customer stands to benefit, both in-store and via digital channels. OEMs, particularly those with large global smartphone market share such as Samsung, should follow Apple's lead in educating consumers.

Typical eSIM provisioning methods are QR codes and in-app activation. While QR codes are widespread, they can introduce friction with consumers that are not technologically savvy and introduce them to QR code-based fraud. To improve provisioning, Juniper Research notes that operators should focus on building a seamless, single-step, in-app experience. Aggregator apps could further simplify the market for consumers; allowing them to compare and purchase plans from multiple operators within a single app. This would, however, rely on industry-wide API standardisation.



AI Agents Will Redefine Customer Interaction at Scale



MVNOs and Travel eSIMs Converge to Serve the Global Roamer



RCS Business Messaging Becomes Major Battleground for Fraud



Growth in Partnerships Between Digital Marketing Agencies & CPaaS Platforms



Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity



Messaging and Voice Verification Begin to Converge for Enterprise Security



Substantial Growth in MVNO Launches Across Various Industries



6G Research Accelerates with Focus on Terahertz Spectrum Innovation



KYC APIs See Rapid Adoption Across Digital Services in 2026



Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts

Top 10 Telecoms & Connectivity Trends 2026 Summary

Trend	Related Research	Whitepaper
1. AI Agents to Redefine Customer Interaction	Conversational AI Market: 2025-2029	Link
2. MVNO & Travel eSIM Solutions to Converge	Travel eSIM Market: 2025-2030	Link
3. RCS Becomes New Battleground for Fraud	Mobile Messaging Fraud Prevention Market: 2025-2030	Link
4. Digital Market Agencies & CPaaS Platforms Partner	CPaaS Market: 2025-2029	Link
5. Multi-orbit Satellite Networks Lay the Groundwork for Next-gen Connectivity	Direct to Satellite Market: 2025-2030	Link
6. Messaging and Voice Verification Begin to Converge for Enterprise Security	Robocall Mitigation & Branded Calling Market: 2025-2030	Link
7. Substantial Growth in MVNO Launches Across Various Industries	MVNO-in-a-Box Market: 2024-2029	Link
8. 6G Research Accelerates with Focus on Terahertz Spectrum Innovation	6G Development Market: 2024-2032	Link
9. KYC APIs See Rapid Adoption Across Digital Services in 2026	Network APIs Market: 2025-2030	Link
10. Consumer eSIM Provisioning to be Streamlined to Accommodate Market Shifts	eSIMs & iSIMs Market: 2024-2028	Link



The Process & Methodology

The identification and scoring process for Telecoms & Connectivity Top 10s begins with Juniper Research's team of in-house analysts and thought leaders conducting extensive research and analysis on emerging technologies, industry developments, and market disruptions in the telecoms space. Our team reviews a wide range of sources - including our own research portfolio, forecast suites, industry reports, market research, and expert opinions - to develop an initial long list of potential trends.

Once this list is compiled, the team engages in a structured debate to critically assess the significance, feasibility, and relevance of each trend for the year 2026. Experts evaluate the potential market adoption, technological breakthroughs, and socioeconomic factors influencing these trends. Through multiple rounds of discussion, the list is gradually narrowed down based on criteria such as potential growth, disruptive potential, and alignment with key industry shifts. After extensive deliberation, the team votes to finalise the top 10 trends.

Following selection, each of the top trends is expanded by answering three key essential questions:

- What will happen? A detailed explanation of the trend, including its technological, economic, or social drivers.
- What is the impact? This section outlines the specific effects of the trend on businesses, consumers, and industries; highlighting potential opportunities and challenges.
- Why 2026? The rationale for why this trend is expected to materialise or gain significant traction in 2026; backed by key data and market indicators.

About Juniper Research



Juniper Research has been providing essential market intelligence to the telecommunications and network operator industries for over two decades.

Whatever sector they work in, our clients – including many of the world's leading operators, service providers, and telecoms technology providers – benefit from actionable knowledge and insight; delivered by experienced industry experts, and backed up by robust and dependable forecasting models.

Our operators and providers portfolio comprises 30 plus reports; covering everything from established technologies such as CPaaS and Mobile Messaging, to emerging technologies such as 6G, MVNO-in-a-Box, and 5G Satellite Networks.

This level of coverage, together with our industry-leading client support programme and quarterly forecast updates, means that no matter how fast the market moves, our clients never have to worry about being left behind.

For more information, contact Nick Mardell, VP of Sales:

nick.mardell@juniperresearch.com

Or visit our website at:

<https://www.juniperresearch.com>

