

GENERATIVE AI READINESS IN TELCO:

# From Ambition to Impact

## About the Altman Solon Generative AI Readiness Survey

In November 2025, Altman Solon surveyed 109 senior telecom executives globally to assess how operators are shaping generative AI strategy, investment priorities, value realization, and readiness to scale. Respondents spanned major regions and operator types. Detailed methodology and analyses are provided in the appendix.

### From ambition to impact: generative AI as an enterprise performance differentiator

In telecom, generative AI has shifted from an efficiency tool or an IT experiment to an enterprise capability that is reshaping how operators create value, allocate capital, and compete. Nearly three-quarters of operators we spoke with report measurable EBITDA uplift from generative AI initiatives, but results are uneven: top performers deliver approximately 7% uplift, while peers deliver approximately 2%. The gap is widening.

Generative AI failures are rarely rooted in model performance alone. They often stem from gaps in governance, capital discipline, and operating model alignment.



#### CEO reality check

- When leaders are capturing EBITDA uplift, delaying action carries an opportunity cost. It's no longer *whether* to engage, but how to engage.
- A proliferation of AI pilots may signal enthusiasm, but without scale and value realization, experimentation can dilute focus and erode returns.
- As AI systems become more autonomous and embedded in core processes, accountability evolves. Governance must be owned at the enterprise level and with isolated teams.

Generative AI is creating value across multiple domains at once, forcing trade-offs no single function can resolve alone. About 72% of realized value comes from customer service, network operations, and marketing & sales, where cost, service quality, and growth decisions are tightly linked.

As generative AI evolves from assistive tools to agentic systems, decision-making and execution are shifting from human-led processes to autonomous workflows. That shift changes how accountability, risk ownership, and control must be managed at the enterprise level.

**"From functioning agents to early-stage pilots, we have more than 50 projects going on to improve productivity for our team and customers. Our goal is for AI to provide real value across the entire business."**

– Chief Transformation & Technology Officer, APAC Telco

High-performing operators distinguish themselves not by investing more, but by **governing differently**. They:

- > Put business leaders on the hook for outcomes
- > Embed generative AI into core operating models (not just IT or innovation)
- > Scale a focused set of use cases with clear performance accountability

**"For AI to succeed, you need not only technical expertise but also the business to buy in and own the decision. Success needs to be tied to the business unit with P&L owners on the hook and accountable."**

– Senior Director, AI and Data, U.S. Telco

For telco CEOs and CFOs, the implication is clear: generative AI, and increasingly agentic AI, is now a business decision, not solely a tech one. Over the next 12–18 months, outcomes will hinge on whether leaders set clear guardrails for autonomy and apply strict capital discipline to what gets funded—and what gets stopped.

## The ambition-readiness gap: where telcos overreach or underperform

Generative AI ambition is high across telecom, but readiness is uneven. That gap is now limiting outcomes.

**About 35% of telcos are high-ambition but low-readiness.** They lack the alignment and governance needed to deliver at scale. Initiatives proliferate, but more than half stall at proof-of-concept, driving pilot congestion and ROI leakage.

This pattern is more frequent among smaller operators seeking disruption; scale is not the root cause. Execution discipline is.

**“There is significant operational complexity to add AI to a use case or business process. Teams need to manage the models, the AI infrastructure, and the personnel and technology required, all in an effective manner to allow it to work.”**

– Senior Director, AI & Data, U.S. Telco

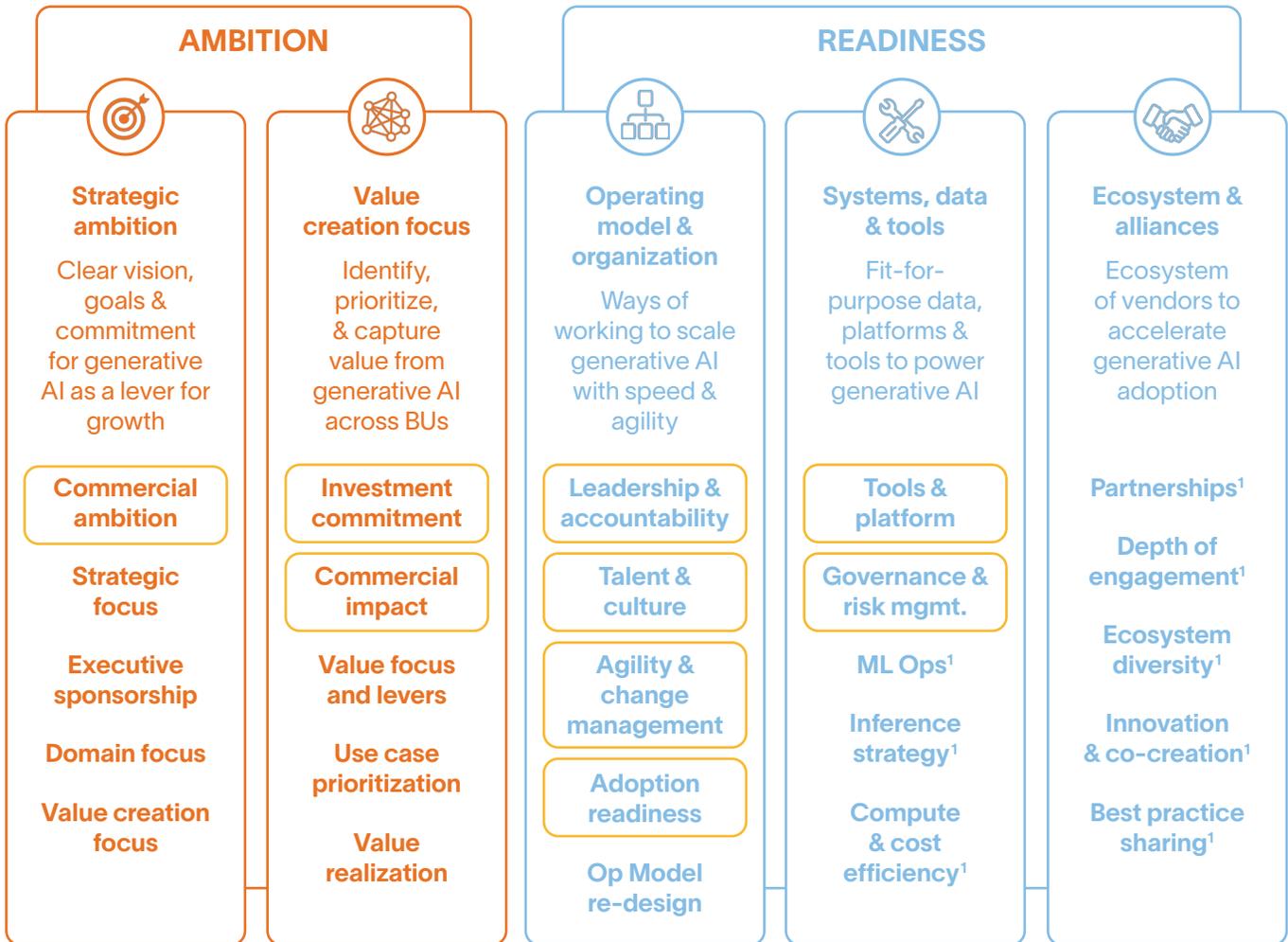
**In contrast, around 25% of telcos show readiness that exceeds ambition.** These operators:

- Have built strong technical and data foundations, but remain cautious in deployment
- Exhibit risk aversion, governance uncertainty, or leadership hesitation
- Under-monetize their capabilities and delay advantages that could be captured through bolder execution

To explain this misalignment, we break generative AI maturity into ambition and readiness components that determine whether initiatives scale or stall.



## Generative AI Maturity Framework



 Subset considered in simplified assessment

1) Partially/not assessed as part of the 2025 Altman Solon Telco Generative AI Survey; Source: Altman Solon

The critical differentiator is decision rights and accountability. While generative AI initiatives often involve multiple CXOs, only one in four operators reports full alignment between AI and commercial strategy. Execution improves not by adding stakeholders, but by clarifying who can green-light scaling, who owns downside risk, and who approves autonomy thresholds.

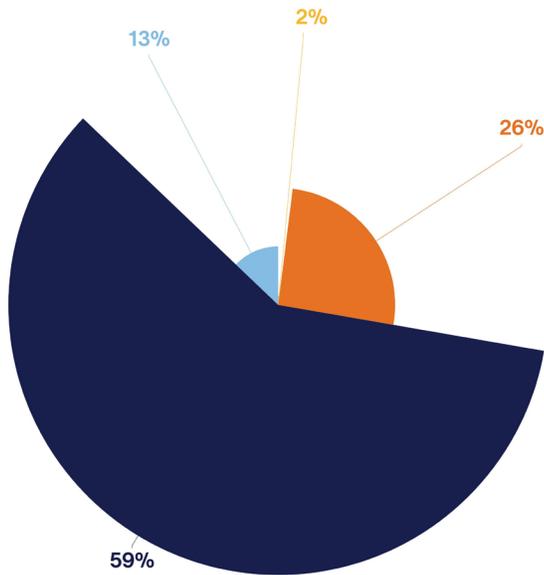
High-performing operators make faster decisions and shut down underperforming use cases earlier. Operators with tight AI-commercial alignment are materially more likely to move beyond pilots and realize enterprise value, reinforcing that generative AI success is driven by CEO mandate and accountability, not committee-based governance.

**AI & Commercial Strategy Leadership Alignment**

- Fully aligned
- Partially aligned
- Minimally aligned
- Not aligned

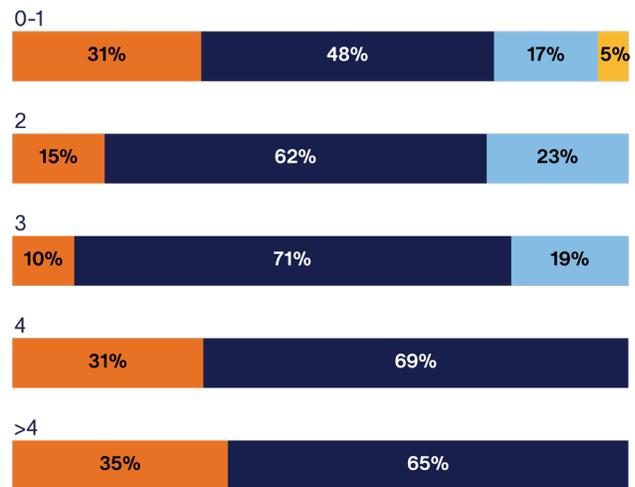
**Alignment between AI and commercial strategy**

% of respondents; N = 109



**Strategic alignment by number of decision makers**

% of respondents; N = 109



Source: 2025 Altman Solon Telco Generative AI Readiness Survey

**From efficiency to autonomy: where generative AI creates value today and where it will create advantage next**

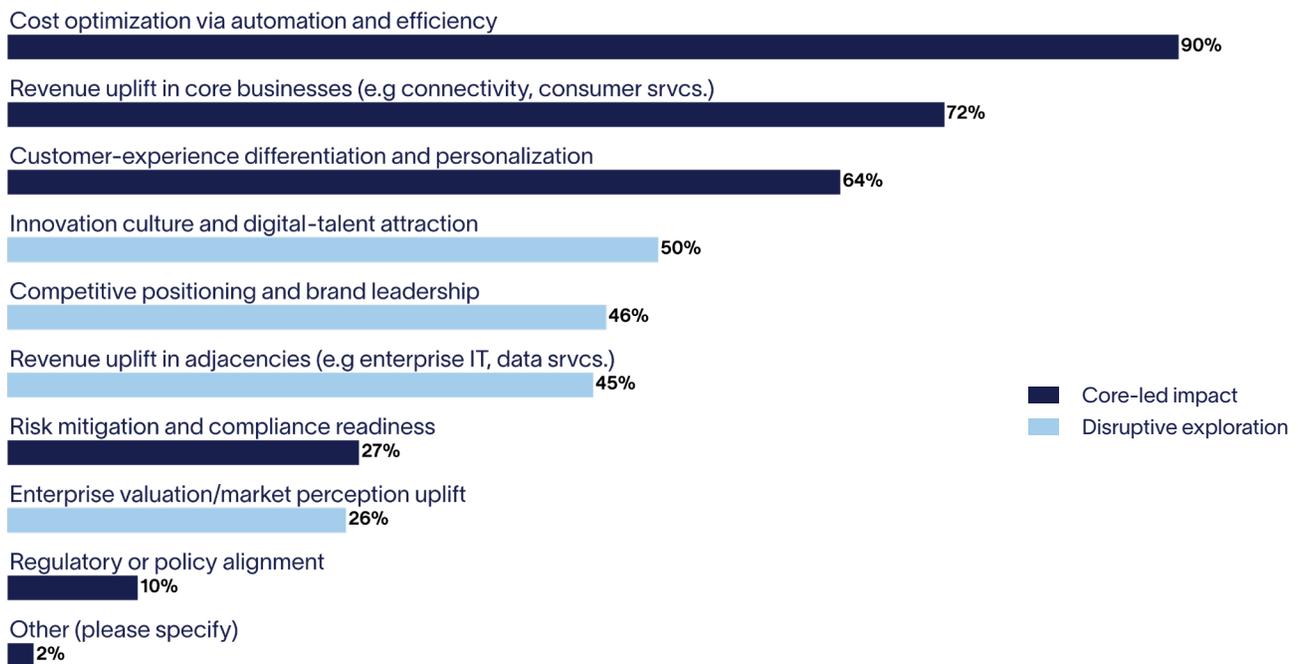
Today, realized generative AI value is still predominantly efficiency-led: nearly 90% of telcos focus investment on automation and near-term returns. Fewer than half are actively pursuing more disruptive applications (new operating models, revenue adjacencies, or market repositioning), which are often deferred until capabilities and governance mature.

## AI Investment Focus

	Core-led impact	Disruptive exploration
Focus	<ul style="list-style-type: none"> <li>Optimize today's P&amp;L</li> <li>Strengthen existing business lines</li> </ul>	<ul style="list-style-type: none"> <li>Create tomorrow's P&amp;L</li> <li>Build new growth horizons</li> </ul>
Time horizon	12–24 months	3–5 years
Financial logic	<ul style="list-style-type: none"> <li>Near-term ROI</li> <li>Payback-driven</li> </ul>	<ul style="list-style-type: none"> <li>Long-term sustainable value creation &amp; profitability</li> <li>Portfolio-style investment logic</li> </ul>
Risk posture	<ul style="list-style-type: none"> <li>Low risk tolerance</li> <li>Execution discipline</li> </ul>	<ul style="list-style-type: none"> <li>Higher risk appetite</li> <li>Exploratory approach</li> </ul>

### Most telcos remain core-driven – disruptive motives still secondary

(% of respondents)



Source: 2025 Altman Solon Telco Generative AI Readiness Survey

Once scale is reached, autonomy becomes an economic necessity in high-volume, labor-intensive areas. At sufficient ticket, fault, or campaign volumes, keeping humans in every loop adds cost and delay that erodes much of the value. The question shifts from whether to deploy autonomy to how it is governed. Operators who delay automation for risk reasons may end up increasing risk over time by creating human bottlenecks.

The shift from augmentation to autonomy is already underway in networks and operations. **Around half of operators are deploying self-healing or predictive maintenance capabilities, and two-fifths are implementing traffic optimization and capacity planning.** Many more are planning network automation and field copilots, signaling a move from assistive tools toward AI-driven execution.

**“We have generative AI working at real scale across the business ... over the coming months we expect to be scaling [agentic AI] inside our business.”**

– CEO, APAC Telco

**Operators deploying more autonomous workflows report higher realized value per use case than those focused only on copilots,** especially where performance and reliability translate into financial outcomes. But autonomy also shifts accountability from individual users to the enterprise, increasing pressure to define decision rights, escalation paths, and financial controls. For many telcos, governance readiness is now the constraint.

Planned investments point to a pivot toward growth-oriented use cases, with the largest increases in enterprise connectivity, enterprise IT services, cloud, and wholesale.

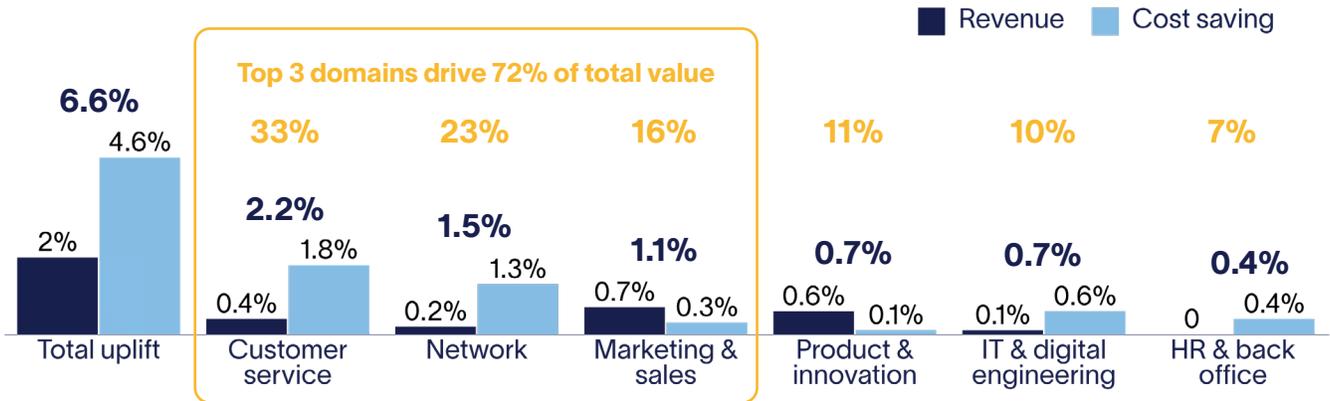
Early movers are already demonstrating impact, with one European incumbent achieving approximately \$200 million in EBITDA uplift by linking network optimization and B2B service assurance to commercial outcomes ([see case study in the appendix](#)).

The next phase of value creation will be driven by more autonomous use cases that cut across network, product, and enterprise customers. This sets the stage for why network AI can emerge as a strategic growth engine.

### **The AI strategic growth engines are disproportionately driven by customer service, network, and marketing & sales**

Generative AI value in telecom concentrates first in customer service, network operations, and marketing & sales. In early phases, spreading effort too broadly typically dilutes ROI. Other domains can matter, but they tend to follow once these engines are delivering repeatable impact. High-performing operators sequence their bets deliberately.

### Directional Breakdown of EBITDA Uplift by Domain



### KEY USE CASES (% OF TELCOS DEPLOYING<sup>1)</sup>)

#### CUSTOMER SERVICE:

- AI agents & chatbots (68%)
- Agent copilots & summarization (69%)
- Trouble-ticket prediction & field support (48%)

#### NETWORK:

- Self-healing & predictive maintenance (50%)
- Traffic optimization & capacity planning (39%)
- Energy-efficiency AI

#### MARKETING & SALES:

- Predictive targeting & cust. segmentation (53%)
- Generative campaign & content tools (55%)
- NBO/NBA engines (27%)

1) Use case deployment data based on functional-area responses to: "Please indicate which Generative AI use cases your organisation is deploying or planning";

Source: Market participant interviews and 2025 Altman Solon Telco Generative AI Survey

**Customer service remains the dominant source of value** from generative AI. Leading operators use AI for first-line care, voice and chat agents, and personalization at scale. Results include **30–40% call deflection**, a handling-time reduction of over **20%**, plus better first-call resolution and satisfaction. For large operators, this can translate to over **\$30 million in annual savings**.

Network operations are becoming a major source of AI value as use cases move toward autonomy. Operators cite **self-healing networks, predictive fault detection, automated fault correlation, and proactive capacity management**. Reported impact includes **up to 50% lower MTTR, about 40% fewer outages, and over \$100 million in annual savings (roughly 3–4% EBITDA uplift)**. It should be noted that the generative AI tech stack driving these savings includes foundational capabilities and multi-year investments (e.g., data, platforms, talent, etc.) with generative AI acting as an enabling layer. EU operators note that these use cases can align teams because reliability gains improve customer experience and commercial outcomes.

**“Network use cases not only help reduce costs but also drive improvements to other parts of the business, for example, on customer experience when faults arise, or new connection requests come in. Given its impact across the business, alignment is often easier for stakeholders as well.”**

– COO, EU Telco

**Marketing & sales applications** extend generative AI impact from cost and reliability into growth. Operators are using it for personalized offers, next-best-action engines, and AI-driven campaign execution. **These use cases are already delivering \$50–100 million in incremental annual revenue uplift, with EBITDA gains of around 1%, as operators reduce churn, lift ARPU, and improve campaign ROI through more targeted engagement.** Full case studies across customer service, network operations, and marketing & sales are included in [the appendix](#).

### **Trust and execution clarity separate leaders from followers**

Generative AI success in telecom is not explained by budget size, market position, or geography. Operators with comparable resources achieve materially different outcomes based on leadership discipline in how generative AI is governed, measured, and owned.

In high-performing operators, trust is earned through metrics and consequences. KPIs are non-negotiable; underperforming use cases are shut down, and realized savings are transparently reinvested. Trust is the by-product of clarity, not consensus.

**“It’s not just about the budget; it’s about trust ... Building a level of trust where both the business team and AI team feel confident about each other’s proposals is difficult to achieve but essential.”**

– Senior Director, AI & Data, U.S. Telco

**High-performing operators create a flywheel:** clear ambition becomes a focused portfolio, backed by rigorous KPIs and tight integration. Realized value is reinvested to fund further initiatives, accelerating scale rather than fragmenting effort.

For example, an APAC operator’s CEO mandated that generative AI initiatives be tied to C-suite KPIs and clearly defined ownership. An AI Center of Excellence helped local OpCos align quickly on the network as the priority. That alignment turned a \$50 million investment into over \$100 million in annual savings ([see appendix](#)).

## Value Realization Tracking

	Level of value realization			
	Least mature			Most mature
	No formal measurement in place	No consistent framework, ad-hoc measurement	Function-level KPIs tracked within BUs	Formal enterprise-wide framework incl. defined KPIs and governance
Description	No systematic measurement or review process; success judged on perception or adoption levels	ROI assessed informally based on pilot feedback or qualitative outcomes	Each business unit defines its own Generative AI performance metrics; limited aggregation across the organization	Organization-wide approach with defined ownership and audit mechanisms; ROI integrated into planning
Characteristics	<ul style="list-style-type: none"> <li>Lack of defined KPIs or ownership</li> <li>Generative AI seen as exploratory R&amp;D</li> <li>Benefits discussed qualitatively only</li> </ul>	<ul style="list-style-type: none"> <li>Sporadic tracking of outcomes per project</li> <li>KPIs defined post-hoc or only for flagship pilots</li> <li>No governance layer</li> </ul>	<ul style="list-style-type: none"> <li>Measurement driven by specific domains (e.g. network, marketing)</li> <li>No enterprise-wide standards</li> <li>Success metrics vary by team</li> </ul>	<ul style="list-style-type: none"> <li>Central Generative AI steering committee or PMO</li> <li>Standardized ROI metrics (e.g. cost savings, revenue uplift)</li> <li>Quarterly tracking and reporting to C-suite</li> </ul>
% of respondents (n=109) <sup>1</sup>	9%	20%	46%	25%

1) Qn: "How is your organisation currently measuring the value realisation and ROI of Generative AI initiatives?"; Source: Altman Solon

Only about 25% of telcos report a formal, enterprise-wide framework to track generative AI ROI and business impact. Without it, value stays anecdotal, trust erodes, and scaling beyond isolated wins becomes difficult.

### In a resource-constrained environment, leaders win by doing fewer things better

As generative AI adoption accelerates, resource constraints have become the primary limiter of scale and impact. Operators cite talent and skill shortages (51%), integration with existing systems (50%), and data quality, security, or model-performance issues (43%). Trying to run too many initiatives in parallel can dilute effort, stall pilots, and reduce impact.

**Leading operators prioritize depth over breadth** Rather than maximizing the number of use cases, leading operators cap how many generative AI initiatives run at any one time and select them using three filters:

- > Feasibility: Can it be delivered with existing capabilities?
- > Portability: Can it scale across functions or markets?
- > Expected return on investment

Use cases without clear portability are deprioritized by default. This concentrates scarce talent, data, and engineering capacity where generative AI can have the greatest impact.

**“We decide on use cases with the highest impact. That means assessing feasibility and portability first, then looking at return on investment. Given resource constraints, it is critical to automate what matters most.”**

– Chief of Staff (COO), EU Telco

This discipline also supports scale. Use cases that can be replicated across customer care, sales, or operations create far more value than bespoke solutions. In this model, Centers of Excellence (CoE) exist to industrialize and scale proven use cases, not to sustain open-ended experimentation.

**“We look at several metrics, but it ultimately comes down to impact. That may be cost savings, but it can also be scalability across other parts of the business ... An example is using generative AI in customer care. Previously it was not feasible to build a chatbot for each type of problem but with generative AI we can see a world where contact centers can at some point become fully managed autonomously.”**

– Head of Product, EU Telco

Operators that apply explicit stopping rules and structured prioritization are more likely to scale beyond pilots and achieve repeatable value. As constraints tighten, prioritization becomes a core CXO decision about where the organization will, and will not, invest in generative AI capacity.

### **Enterprise readiness, not technology, is now the limiting factor for generative AI scale**

While ambition is high, organizational readiness is not keeping pace. Awareness and top-down communication score relatively well (4.2 out of 7), but the capabilities required to translate intent into adoption score lower (3.8 out of 7). Most operators respond with skills and change programs, but operating-model redesign is less advanced and remains the main constraint to scaling generative AI.

These gaps widen as use cases become more transformative and move toward agentic AI. Centrally defined use cases often fail to translate into local operating contexts, slowing adoption even when models perform well. Without clear decision rights, escalation mechanisms, and accountability, technically successful use cases struggle to scale beyond pilots.

**“At the beginning, we faced difficulties in how these initiatives would work in practice ... We realized it was critical to consult the organization from top to bottom to ensure alignment and success.”**

– Director, APAC Telco

As autonomy increases, governance, risk management, and trust become binding constraints. Operators need clear decision rights, escalation paths, and financial controls to ensure agentic systems deliver value without unintended consequences. These are operating-model decisions, not capability-building activities.

### Overview of Readiness Assessment (simplified)

Dimension	Description	Metrics	Relative positioning and gaps
<b>Operating model &amp; organization</b>	Strength of accountability, AI awareness, training, change management and adoption	Avg. score: ~3.9 out of 7 High awareness (4.2) but low adoption readiness (3.8) Top challenges: Talent shortages (51%), culture barriers (30%)	Strong leadership intent but fragmented ownership and weak change enablement hinder scaling
<b>Tools &amp; platform</b>	Maturity of data governance, tooling, and KPI systems and frameworks	Avg. score: ~4.6 out of 7 Solid platform and policy maturity; KPI definition weakest Top challenges: Data quality & integration issues (43–50%)	While access and policy maturity score >4, measurement and data integration remain among the top three challenges
<b>Governance &amp; risk management</b>	Maturity of ethical, regulatory, and risk-management frameworks	Avg. score: ~4.3 out of 7 Compliance strong; incident response and post-event learning weakest Top challenges: Risk & regulatory concerns (34%), unclear ownership (22%)	Frameworks exist but remain operational rather than adaptive; few have embedded AI-specific governance

## What should telco executives do in the next 12-18 months?

The next phase of generative AI adoption is not about accelerating experimentation. It is about building repeatable execution.

For telco executives, this is now a set of explicit choices. Closing the ambition–readiness gap requires narrowing focus, assigning accountability, and making clear stopping decisions.

Executives who succeed will move generative AI out of pilot mode and into the core business by embedding it into decision-making, performance management, and capital allocation. When these decisions are explicit, generative AI becomes a self-reinforcing engine. When they are deferred, initiatives fragment and value dissipates.

Contact Altman Solon to discuss your generative AI readiness, prioritization choices, and path to scale.



### CEO decision checklist for the next 12–18 months

- Which generative AI initiatives will we stop funding in the next 6–12 months?
- What top three generative AI use cases will carry explicit P&L ownership?
- What autonomy thresholds will we allow in network operations and customer care?
- How will realized generative AI value be reinvested, and who has decision rights over that reinvestment?
- What organizational and operating model capabilities must be redesigned to allow generative AI to scale safely and repeatably?

## Appendix

### About the Altman Solon Generative AI Readiness Survey

In November 2025, Altman Solon surveyed 109 senior telco executives to understand how operators are shaping their generative AI strategies. The survey explored ambition, investment priorities, value realization, and enterprise readiness to scale. Respondents represented North America, Europe, APAC (developed and emerging markets), the Middle East and Africa, and Latin America. The sample included integrated operators, fixed operators, mobile network operators (MNOs), mobile virtual network operators (MVNOs), fixed wireless operators, and other provider models. Company size ranged from market leaders generating over \$5 billion in annual revenue to challenger brands with annual turnover under \$100 million.



**CASE STUDY**

European incumbent achieved \$200m savings and revenue uplift through hybrid AI optimization across network, B2C and B2B

**EU TELCO**  
(>\$5'bn ARR)

**Generative AI ambition & investment focus:**

Hybrid optimization across network, B2C and B2B with selective new revenues

**Governance & budgeting:**

- > CDO leads overall agenda
- > Central ROI office under Finance validates/tracks value
- > Payback target: 12–24 months

**Operating model:**

Hub-and-spoke: central Digital (~50 FTEs), innovation units (~20 FTEs) build shared models/toolkits while local BUs customize

**Financial impact:**


**\$200m**  
EBITDA uplift



**<\$100m**  
invested



**3x**  
returns targeted

**Key use cases (non-exhaustive)**

**NETWORK OPTIMISATION**

- \$100–200m value realised through AI-driven capacity and site planning (e.g., network design optimization/site planning)
- Delivered ~30% opex savings and 15% productivity gain in engineering teams


**CUSTOMER NBO/NBA**

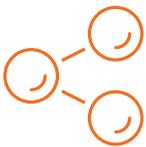
- ~\$80m incremental uplift from targeted cross-sell and upsell campaigns
  - Resulted in higher marketing conversion rates and lower churn risk


**B2B MANAGED OPS.**

- ~\$40m incremental uplift from workflow automation and data-driven sales insights
- AI tools streamlined B2B account management and proposal generation

## CASE STUDY

Three operator examples illustrate how Generative AI turns efficiency and personalisation into real EBITDA gains

	Case example	Operational driver	Financial outcome	Generative AI value-add
 <b>CUSTOMER SERVICE</b>	<b>APAC telco (&gt;\$5bn ARR)</b> AI agents & copilots	<ul style="list-style-type: none"> <li>→ Automated first-line care &amp; live agent assist</li> <li>→ ~30% calls deflected</li> <li>→ AHT<sup>1</sup> ↓ 20 %</li> <li>→ FCR<sup>1</sup> ↑ 10-20 pts</li> </ul>	<ul style="list-style-type: none"> <li>→ <b>\$30m annual saving</b> (~1-2% EBITDA uplift)</li> <li>→ Contact-centre cost ↓ 8%</li> <li>→ CSAT<sup>3</sup> ↑ 5 pts</li> </ul>	Enables human-like voice agents handling 70% of calls, driving 30-40% savings and NPS gains
 <b>NETWORK</b>	<b>APAC telco (&gt;\$5bn ARR)</b> Self-healing network automation	<ul style="list-style-type: none"> <li>→ Automated fault correlation &amp; predictive maintenance</li> <li>→ MTTR<sup>2</sup> ↓ 50 %</li> <li>→ Outages ↓ 40%</li> </ul>	<ul style="list-style-type: none"> <li>→ <b>\$100m annual saving</b> (~3-4% EBITDA uplift)</li> <li>→ Managed-service spend halved (L0-L1)</li> <li>→ NW uptime ↑ 1.5 pp</li> </ul>	Powers self-learning autonomous NW; maximise asset use & cut redundant capex beyond AI rule-based limits
 <b>MARKETING AND SALES</b>	<b>European telco (&gt;\$5bn ARR)</b> NBO/NBA engines	<ul style="list-style-type: none"> <li>→ Personalised offers</li> <li>→ Churn ↓ 1-2 pp</li> <li>→ ARPU ↑ 1-3%</li> </ul>	<ul style="list-style-type: none"> <li>→ <b>\$50-100m annual revenue uplift</b> (~1% EBITDA uplift)</li> <li>→ Campaign ROI ↑ 10-20 %</li> </ul>	Generates adaptive content and campaigns in-house; reduce agency reliance & boost personalised rev. impact

1) AHT – Average Handling Time, FCR – First Call Resolution; 2) MTTR – Mean Time To Repair;

3) CSAT – Customer Satisfaction;

Source: Market participant interviews and 2025 Altman Solon Telco Generative AI Survey

**CASE STUDY**

While still in early stages of scaling impact, an APAC challenger achieved 5x ROI through energy and network optimisation

**APAC TELCO**  
(\$>5 bn ARR)

**Generative AI ambition & investment focus:**

Drive ARPU protection, operational efficiency and capex optimisation through AI-enabled network automation

**Governance & budgeting:**

- CEO-led AI mandate with C-suite KPIs tied to efficiency targets
- Dedicated funding ring-fenced within broader transformation target

**Operating model:**

- Federated model – central blueprint. Ensures rapid scaling across OpCos
- Central AI COE defines architecture; local OpCos execute deployment

**Financial impact:**



**\$150m<sup>1</sup>**  
EBITDA uplift representing double digit %



**\$80m<sup>1</sup>**  
invested on GenerativeAI



**2x**  
ROI returns achieved

**Key use cases (non-exhaustive)**



**SELF-HEALING NETWORKS**

- \$50m invested; \$100m annual savings from managed-service optimisation
- Halved vendor support costs and improved mean-time-to-repair



**SMART TRAFFIC ROUTING**

- Revenue uplift (~+\$10m) from reduced subscribers denial (e.g. pay per use service) across 20-30m prepaid subs
- Increased wholesale utilisation ~8-10% uplift (~+20m uplift)



**AI AGENTS & COPILOTS**

- \$30m uplift from faster product cycles, lower churn, incremental cust. lifetime value (call deflection/ARPU)
- Reduced average call vol. by 30% and GTM approval cycles from 4 to 1 month

1) Figures in USD;  
Source: Market participant interviews

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