Ercole Rovida's Newsletter

September 2025

MESSAGE FROM THE AUTHOR

Welcome to ErcoleRovida's Newsletter!

This project was born with a simple idea: to give my followers a newspaper dedicated to the IT and telecommunications industry. For years, I have seen how quickly this sector evolves, how new technologies reshape the way we live and work, and how challenging it can be for professionals to keep track of it all. My goal with this newsletter is to make that journey easier, more insightful, and more connected.

By bringing you curated telecom news, insights, and trends, I hope to offer more than just information. I want to provide a **trusted space** where professionals across borders can access the same knowledge, reflect on the same topics, and share perspectives that enrich us all. The telecom and IT industry is truly global, and so should be the way we talk about it.

Each month, you will find a balanced mix of **market highlights, regional deep-dives, emerging technologies, featured stories, and thought-provoking topics** that reflect both the opportunities and the challenges of our sector.

Whether you are interested in how 5G is transforming industries, how AI is reshaping networks, or how digital services empower SMEs, this newsletter is here to help you stay ahead.

But beyond the headlines, my mission is to provide **clarity, context, and connection**. The pace of change in IT and telecom is relentless, and sometimes overwhelming. Having a place where the noise is filtered, where the important stories are explained, and where innovation is put into perspective is, I believe, something valuable.

Most importantly, I want this project to **build a community**. A community of readers who are not only consumers of information but active participants in the conversation. I encourage you to share your thoughts, your experiences, and your feedback — because this newsletter will grow stronger with your voice in it.

Thank you for trusting me to guide you through this journey. Every edition is prepared with care and with the conviction that knowledge should not only inform, but also inspire. Let's learn, share, and build the future of out market together.

Stay connected. Stay informed. Stay ahead

Ercole

GLOBAL MARKET SNAPSHOT

What Is The Telecom Market Size 2025 And Growth Rate?

The telecom market size has grown strongly in recent years. It will grow from **$2986.48 billion in 2024 to $3164.35 billion in 2025 at a compound annual growth rate (CAGR) of 6.0%.**

The growth in the historic period can be attributed to growing number of internet users, increasing adoption of 5G networks and rise in adoption of cloud computing among smes (small and medium-sized enterprises).

Telecom Global Market Report 2025
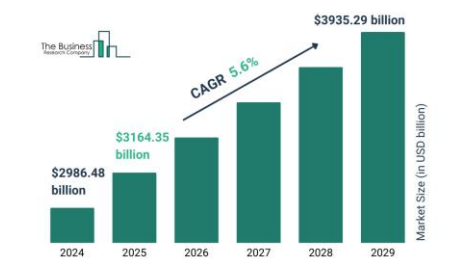
What Is The Telecom Market Growth Forecast?

The telecom market size is expected to see strong growth in the next few years. It will grow to $3935.29 billion in 2029 at a compound annual growth rate (CAGR) of 5.6%. The growth in the forecast period can be attributed to rising smartphone penetration, increasing E-Commerce, increasing urbanization and government initiatives will drive the growth. Major trends in the forecast period include focus on deployment of 5G to support emerging technologies, integration of digital twin as a service (dtaas) for creating virtual replicas of telecom infrastructure , focus on manufacturing new hardware for increasing telecommunication speeds, launch of new satellites for global connectivity and advanced communication services, leveraging AI and ml for improved customer experience, utilizing cloud technologies to enhance scalability, flexibility and cost-efficiency and strategic partnerships and collaborations among market players.

MORE INFORMATION

What Are The Key Trends Of The Global Telecom Market? Increasing Focus On Network-As-A-Services To Gain A Competetive Edge In The Market

Major companies operating in the telecom market are introducing innovative telecom networks such as Network-as-a-Service (NaaS) to gain a competitive edge in the market. Network-as-a-Service (NaaS) is a cloud-based service model that provides networking capabilities to organizations on a subscription basis.

They are also developing innovative products, such as telecom large models, to efficiently handle massive datasets. A telecom large model refers to an advanced machine learning model designed to process, analyze, and optimize vast amounts of telecommunications data, improving network performance, predictive maintenance, and customer service through AI-driven insights.

The Business Research Company
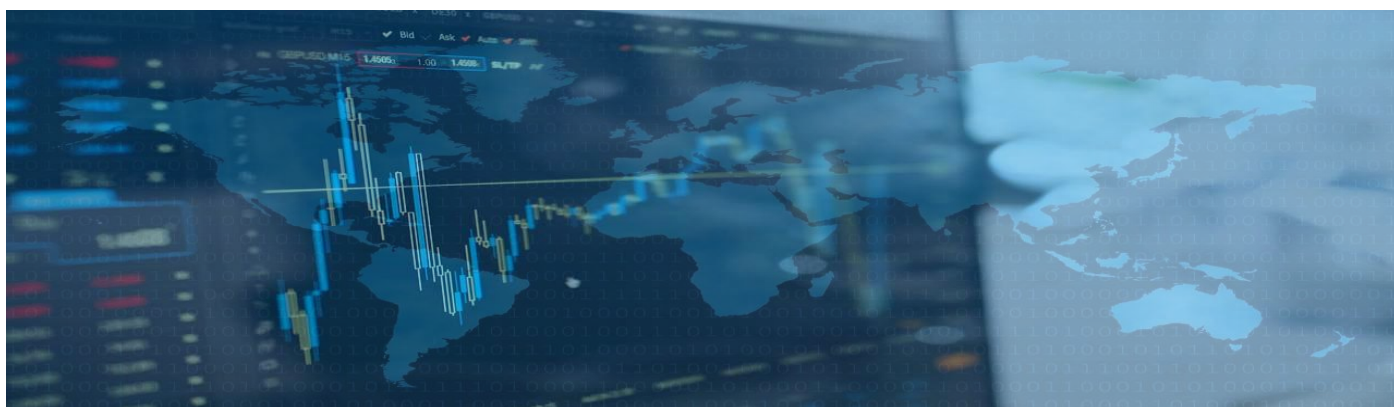
FEATURED STORY

World Economic Forum

Artificial Intelligence in Telecommunications

WHITE PAPER

This white paper explores artificial intelligence's (AI) transformative potential in the telecommunications industry, addressing sector-specific opportunities and challenges. It provides actionable insights to help industry leaders navigate this period of change. The sector faces a challenging landscape, with service commoditization leading to global revenue stagnation, a lack of core service differentiation and a requirement to diversify to drive growth. Technological advancements require that communication service providers (CSPs) manage complex multi-vendor network architectures and defend against sophisticated, AI-powered cybersecurity threats. The resulting operational complexity has already surpassed what traditional, manual processes can support.

As the industry reaches an inflection point, AI will play a critical role in its reinvention. Following extensive experience with traditional AI and a period of experimentation with genAI, there is an industrywide focus on scaling use cases to achieve fourkey imperatives:

– A new model of telecommunications is emerging, whereby AI-enabled automation of network management and technology is reducing cost-to-serve.

– GenAI capabilities are enabling sales and marketing personalization to drive business growth.

– Natural language capabilities are transforming customer service, unlocking innovations in digital service

– In response to a growing cybersecurity threat, CSPs are using AI to ensure secure and reliable operations by automatically identifying and patching vulnerabilities, detecting and responding to incidents and preventing fraud.

Download the whitepaper

> *AI is poised to transform the telecommunications sector, unlocking new business opportunities*

REGIONAL FOCUS – SPAIN AND EUROPE

Technology, media, and telecom in Europe: The new growth engine or another decade of missing out?

Europe's TMT companies have stagnated relative to their peers' growth in other regions. But several emerging battlegrounds could be the key to the sector's turnaround.

The massive expansion of the global technology, media, and telecommunications (TMT) sector has been one of the driving and defining forces of the 21st century's digital and economic transformation. Yet amid the critical sector's unprecedented growth, European TMT companies find themselves at a crossroads, grappling with a stark decline in market capitalization and an urgent need for renewal to sustain economic competitiveness.

Even as TMT's global market capitalization soared from around $7 trillion in 2000 to $34 trillion last year, Europe's share of cumulative global TMT market capitalization plunged from 30 percent to 7 percent. This decline in share translates to an $8 trillion missed opportunity—value that would have been generated by 2024 if Europe had maintained its share of market cap.

However, new McKinsey research suggests that the next wave of technological change and digital disruption could lead to a genuine European TMT turnaround.

McKinsey insight

Europe TMT companies are older, earning less, growing slower and investing less in R&D than their US peers

LISTEN ON THE GO

In memory of Sergio Marchionne, the man who transformed FIAT

An interesting point of view of a real industry leader: Sergio Marchionne. An article from Ercole Rovida's blog.

Sergio Marchionne passed away on 2018. For many managers he was an example and a reference for different reasons.

He changed FIAT recovering a terrible financial situation, gaining again the market and re-position the company in the global market.

He did it thanks to his trust on his managers. Nothing else. Simply selecting his leaders and putting them in the rights positions.

His speech, dated 2008, during a ceremony he has been honored with a degree Honoris Causa.

So actual in 2025!

Simply talking about leadership and stating …"Leaders, the real ones, are nothing more than instruments of change".

Leaders, the real ones, are nothing more than instruments of change.

Read the full article

Sergio Marchionne and his definition of leadership

COMPANY OF THE MOUNTH

## NVIDIA, already the backbone of the AI Boom, has big plans for the future

Nvidia is No. 2 on the list of the World's 50 Most Innovative Companies of 2025. Explore the full list of companies that are reshaping industries and culture.

Large language model makers continue to pour money into realizing the lofty ambitions of their systems. But one company is already reaping the rewards. Nvidia helped kick off the AI race with market-dominating graphics processing units and, according to a Q3 2024 analysis from IDC, has reached a 93% unit market share of GPUs running AI workloads worldwide. Many analysts believe it could grow further.

Nvidia's groundbreaking Blackwell processor, launched last March, is up to 2.5 times more powerful than its predecessor, the H100, and requires much less energy,

says Shar Narasimhan, Nvidia's director of product for AI and data center GPUs. The largest data center operators and AI labs, including Google, Meta, Microsoft, OpenAI, Tesla, and xAI, are reportedly buying Blackwell GPUs by the tens of thousands. Meanwhile, Nvidia's software and networking strive to wring the maximum speed and computing power from the chips. "We have a platform that effectively can read an AI model, understand what the model wants it to do, then go off and disseminate all of these calculations among thousands and thousands of GPUs," Narasimhan says. "So you have all of this inner communication, then it coalesces and serves you back a single response."

Read the full article
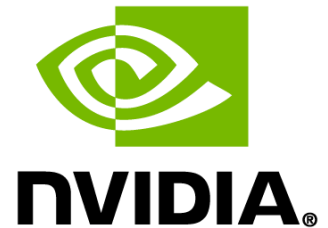
NVIDIA in Brief

NVIDIA pioneered accelerated computing to tackle challenges no one else can solve. Our work in AI and digital twins is transforming the world's largest industries and profoundly impacting society. Learn more.

Company History

Founded in 1993, NVIDIA is the world leader in accelerated computing. Our invention of the GPU in 1999 sparked the growth of the PC gaming market, redefined computer graphics, revolutionized accelerated computing, ignited the era of modern AI, and is fueling industrial digitalization across markets. NVIDIA is now a full-stack computing infrastructure company with data-center-scale offerings that are reshaping industry.

Key Stats

> Founded in **1993**
> Founder and CEO: **Jensen Huang**
> **36,000+** employees in **38** countries
> Record full-year revenue of **$130.5 billion** in FY25
> **8,700+** granted and pending patent applications worldwide
> **$1 trillion** available market opportunity
> **6 million** developers in the NVIDIA Developer Program
> **27,000** global startups in NVIDIA Inception
> No. 1 "America's Best Companies 2025" – *Forbes*
> "World's Most Innovative Companies" – *Fast Company*
> "Best Places to Work in 2025" – *Glassdoor*

Impact by Industry

Automotive
NVIDIA powers all 30 of the 30 top autonomous vehicle data centers.

AI Factories
More than 40,000 companies use NVIDIA AI technology to power AI factories.

Digital Twins
NVIDIA Omniverse™ is used by thousands of developers, including leaders in industrial simulation, automation, and robotics.

Gaming
More than 200 million gamers and creators use NVIDIA GeForce® GPUs.

Healthcare
Over 4 million developers have downloaded the MONAI framework for AI in medical imaging.

Robotics
More than 1.7 million developers use the NVIDIA Jetson™ platform for edge AI.

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EVENTS

- *GITEX in Dubai, a major technology exhibition and conference.*
- *Web Summit in Lisbon, a large technology conference.*

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I VALUE YOUR INPUT:

I'm always looking to improve and make my newsletter more relevant to you! If you have any suggestions, article recommendations, or feedback, feel free to reach out to me via LinkedIn message.

I'd love to hear from you!