

From network to revenue

How telecoms monetize data,
network APIs, and intelligence



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Executive summary

Telecom operators that once fueled global connectivity are now confronting a strategic inflection point. While mobile data traffic continues to surge exponentially, top line growth for operators has largely plateaued. The industry value is shifting upward in the technology stack, away from connectivity and toward applications, data services, and contextual intelligence where customers see a differentiated value.

Both customers and enterprises are increasingly willing to pay for outcomes, not just gigabytes. Capabilities such as reliability, trust, low latency, security, real-time analytics and identity assurance command premium pricing and unlock new business models. To stay competitive, telecom operators must evolve beyond pure connectivity providers into platform and solution providers that deliver these high order outcomes.

First-party data products and network Application Programming Interface (APIs) represent a compelling path forward. By exposing governed insights and network capabilities to enterprises, operators can unlock new monetization opportunities, accelerate innovation, and position themselves as foundational enablers of digital transformation across industries.





What is telecom data monetization?

Telecom data monetization is the practice of transforming network-generated intelligence such as location signals, Quality-of-Service (QoS) insights, fraud markers, mobility patterns, identity verifications, service usage patterns and behaviors into measurable business value.

This value is realized in two ways:

- **Internally**, by improving network performance, security, operational efficiency, and decision-making.
- **Externally**, by creating commercial data products and services that customers, partners, and developers can consume.

The concept has evolved from technology-driven initiative into a business-first, platform-ready model centered around reusable data products, network APIs, and enterprise-grade insights. These assets are designed to be discoverable, secure, standardized and consumable at enterprise scale, enabling operators to participate meaningfully in digital ecosystems.

Importantly, monetization is not about selling raw data, it's about encapsulating network intelligence into privacy-safe, compliant and business-ready products that unlock value for operations, customers and partners while maintaining trust and regulatory alignment.



Why is it relevant and why does it matter more now?

Networks have become programmable:

With the introduction of 5G, cloud-native architectures, edge computing and Open Radio Access Network (RAN), telecom networks are shifting from rigid infrastructure into programmable, software-defined platforms. This transformation allows operators to expose network events, performance data, and control functions as products and APIs. Programmability makes it possible to build insight-driven services, automate network behavior, and enable real-time, customer-specific outcomes.

AI is accelerating data productization:

AI is dramatically reducing the cost and complexity of developing monetizable data products. Tasks such as data governance, quality checks, documentation, taxonomy enforcement, segmentation, and anomaly detection can now be automated. This shortens the product development cycle and enables real-time decisioning from streaming network analytics. AI shifts monetization from bespoke, slow-moving engagements to scalable, repeatable platform-based offerings, unlocking a step-change in economic viability.

API-enabled monetization is becoming standardized:

Industry initiatives such as GSMA Open Gateway and CAMARA are establishing common, operator-agnostic API frameworks. This standardization allows telcos to offer capabilities like device location, quality-on-demand, identity verification, and fraud detection through simple, consumable interfaces. As a result, the network evolves into a platform, and APIs become a monetizable distribution channel with value being tied to usage, outcomes, and partnerships rather than traditional ARPU-based models.

Secure collaboration has become practical at scale:

As telecom operators modernize through 5G, edge computing, cloud-native architectures, and modern data governance models, and clean-room technologies are making secure, large-scale collaboration with enterprises achievable. At the same time, enterprises increasingly require verifiable network-level signals such as device presence, QoS on demand, and identity assurance to support measurable business outcomes in sectors like retail, logistics, financial services and public safety.

Pathways to monetization

Telecom operators can unlock new revenue through two primary commercial pathways: **packaged data products and programmable network APIs.**

Each represents a shift from selling raw connectivity to delivering differentiated, outcome-driven value. Both pathways require operators to adopt a true product mindset, treating data and APIs as products with clear ownership, disciplined pricing models, and enterprise-grade standards for quality, reliability, performance and governance.

1 Packaged data products

Telecom operators can transform network-generated intelligence into repeatable, contract-backed data products engineered for reliability, trust, and enterprise-scale. These products are built with clear service expectations such as Service Level Objectives (SLOs) for freshness, availability, latency and delivery quality while priced across dimensions like geographic scope, aggregation level, and event-based usage.

Packaged data products encapsulate governed, privacy-protected insights that customers can consume through batch feeds, APIs or streaming interfaces. They allow enterprises to integrate telco-grade intelligence directly into their operational decisions without requiring custom development or raw data access.

Examples include:

- Daily or hourly population-movement heatmaps for retailers, transportation agencies or city planners
- Geo-tier pricing models such as single city, multi-region or nationwide coverage
- Privacy-protected aggregated datasets generated using techniques like anonymization, differentiated privacy, or minimum cohort thresholds to ensure compliance and maintain customer trust.

2 Programmable network APIs

Operators can also unlock monetization by leveraging programmable network capabilities through standardized APIs, enabling enterprises and developers to embed telco-powered intelligence directly into digital workflows. These APIs provide access to real-time network attributes such as identity, location, device status, fraud indicators, and QoS controls through secure, governed and metered interfaces.

Programmable network APIs are delivered with enterprise-grade features, including usage metering, rate limits, authentication, monitoring dashboards, and developer tooling. This allows customers to integrate network intelligence at scale for fraud prevention, identity verification, network-aware application behavior, and improved customer experience.

Examples include:

- Fraud and identity verification APIs for banks, FinTechs, and e-commerce platforms
- Usage-based monetization models, where APIs are billed per call, per event or per active device, aligning revenue to measurable outcomes rather than fixed ARPU.

Quick wins (short time-to-revenue)

Telecom operators do not require large multi-year transformation programs to begin monetizing network intelligence. Early revenue can be captured by launching a focused set of high-impact, low-complexity data products and APIs that leverage existing network capabilities and data assets.

Examples of quick win opportunities include:

- Launching identity and verification APIs to digital service providers
- Selling anonymized mobility datasets to retail, real estate and transportation sectors
- Offering enterprise connectivity bundles enhanced with analytics and performance insights
- Creating a developer portal featuring a curated set of paid network APIs.

Strategic takeaways:

- **Enforce data contracts and developer program:** Operators that implement strong data contracts, Service Level Objectives (SLOs), and structured developer programs, achieve higher attach rates and repeatable consumption of APIs and datasets. Clear rules and consistent quality build trust and drive sustained consumption.
- **Product P&L and marketplace distribution reduce cost-to-serve:** Treating data and APIs as standardized, repeatable products, rather than bespoke data-sharing projects, accelerates time-to-revenue and reduces cost-to-serve.
- **Focus on high-value, problem-solving APIs:** APIs address immediate enterprise needs, such as identity validation, fraud checks, quality-on-demand, and location verification, achieve faster monetization due to clear ROI and operational relevance.
- **Privacy by design is non-negotiable:** Products built with embedded anonymization, aggregation thresholds, consent management, purpose limitation, and strong governance expand addressable demand while ensuring compliance across regulated industries like finance, healthcare, and the public sector.

Successful monetization depends on more than network capability alone. Privacy safeguards, transparent data governance frameworks, and clear enterprise-grade SLAs will become critical differentiators as telecom operators compete in the emerging data and API-driven markets.

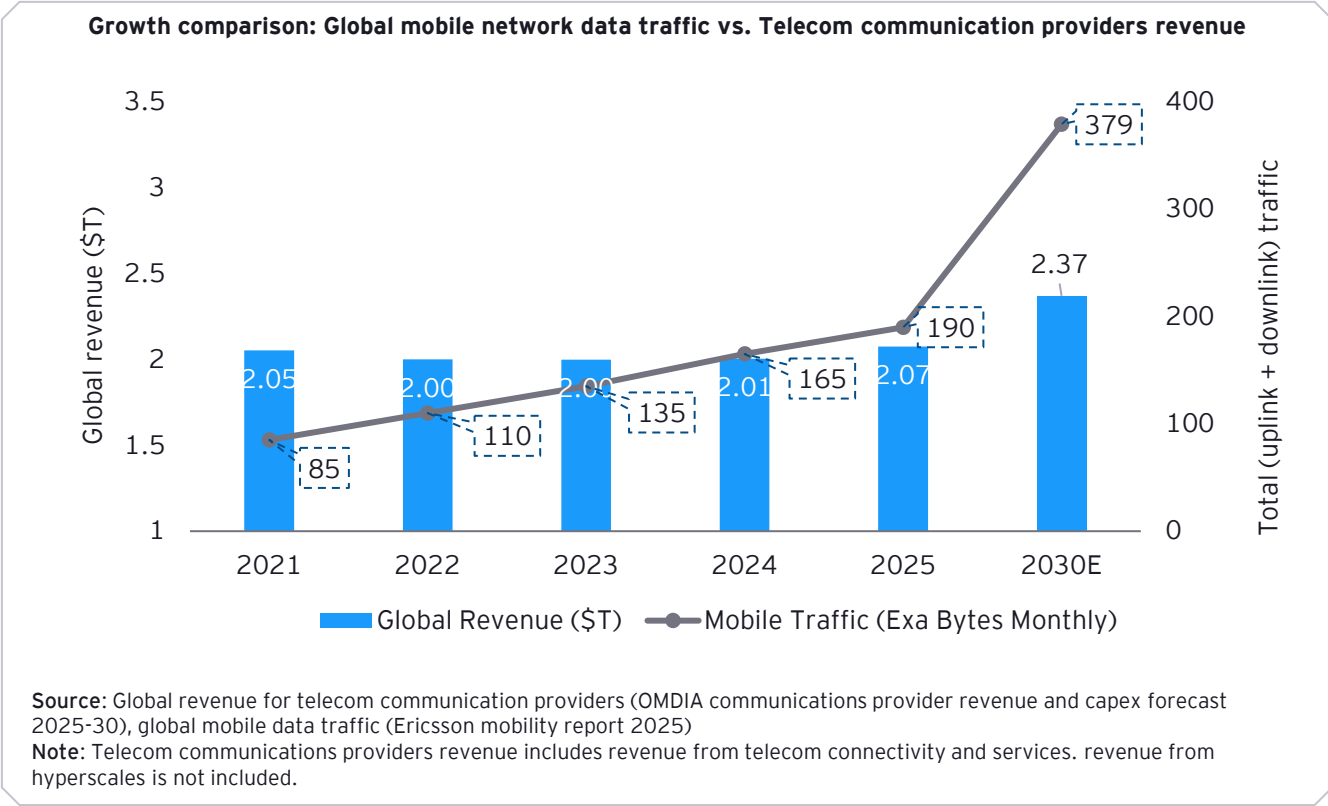
Why now?

Value is migrating from connectivity to data products and APIs

Telecommunications revenue models have been undergoing structural pressure for years. Voice, messaging, and traditional data services have flattened as connectivity becomes a baseline commodity rather than a differentiator. Meanwhile, mobile data consumption continues to grow rapidly – yet this surge in volume does not translate into proportional revenue gains for operators.

This widening gap signals a fundamental shift where economic value is migrating from selling connectivity to monetizing network intelligence. Operators are increasingly packaging this intelligence into standardized data products and programmable network APIs that deliver actionable, real-time insights.

As enterprises accelerate digital transformation and adopt AI-driven operating models, demand is rising for trusted, low-latency, network-derived signals, the kinds of signals that only telecom operators can provide.





What's driving the inflection point?

1 Connectivity is becoming table stakes

Price competition, regulatory pressures, and the ubiquity of high-speed access have eroded margins. Operators are increasingly viewed as “pipes” for digital applications, while value creation shifts to platforms and services that operate above the network.

To reclaim that value, operators must monetize the intelligence embedded in their infrastructure, not just the infrastructure itself. Leading operators are already doing this through scalable models, such as subscription-based data products, marketplace distribution channels and partner integrated API offerings that create repeatable, high-margin revenue.

2 Enterprises are hungry for verifiable intelligence

Across industries, enterprises increasingly require verifiable, real-time signals they cannot source independently. Telecom operators uniquely provide:

- Location and mobility patterns for retail planning, smart cities, and transportation optimization.
- Device presence and identity verification signals for fraud prevention in banking, FinTech and e-commerce.
- Network performance and QoS insights for application tuning and digital experience management.
- IoT telemetry for industrial optimization, environmental monitoring, and logistics.

These signals create measurable business outcomes, unlocking new commercial models tied to real-time decisioning, risk scoring, and operational intelligence.

3 5G SA, Open RAN, and cloud-native cores expose programmable value

Modern network architectures generate high-fidelity datasets and expose programmable interfaces through components like Network Data Analytics Function (NWDAF), cloud-native cores, and open interfaces.

This evolution enables:

- Event-driven data extraction
- Real-time network insights
- Fine-grained QoS and slice-level adjustability
- Programmable network behavior via APIs

These capabilities shift the network from a static asset to a dynamic intelligence platform that can be embedded directly into enterprise workflows.

4 AI accelerates telecom data monetization

AI dramatically increases the commercial potential of telecom data by making it more contextual, predictive, and real-time.

AI enables:

- Faster productization of datasets and insights
- Real-time decisioning and standardized consumption via APIs, metering, and marketplaces
- Privacy-safe monetization using synthetic data, anonymization, and embedded governance.

Historically, analytics monetization struggled from long product build cycles (6-18 months), manual governance approvals, and custom integrations for each partner. AI removes bottlenecks through:

- Automated cataloging and documentation
- AI-assisted compliance mapping
- Intelligent segmentation and insight discovery

5 Privacy-preserving collaboration is now practical

Previously, regulatory complexity limited monetization options. Today, privacy-enhancing technologies such as secure data clean rooms, differential privacy, multiparty governance, domain-level access controls, and encryption at scale allow operators to safely share insights without exposing raw subscriber data. This unlocks data partnerships, especially in regulated sectors that were previously out of reach.

6 Market ecosystems are converging around standards

Industry standards and technology ecosystems are rapidly aligning around standard frameworks for data and API exchange:

- GSMA Open Gateway simplifies global operator-agnostic API exposure.
- Hyperscaler marketplaces expand distribution and developer access.
- Snowflake's native app and data marketplace ecosystem are standardizing the language of telecom API and data product exchange.

Early adopters are already seeing faster time-to-market, higher enterprise adoption, lower developer integration friction and expanded global distribution channels. An increasing number of commercial leaders are beginning to view data products and APIs not merely as experimental initiatives, but as potentially repeatable and scalable revenue streams.

7 Operators need new growth engines

With limited prospects for sustained ARPU growth from connectivity alone, operators are embracing revenue from modern revenue streams:

- Data-as-a-product offerings
- API-driven transactions
- Marketplace and partner-led distribution
- AI-driven operational efficiencies and savings

This whitepaper provides a structured, practical playbook to pursue these opportunities in a way that is commercially viable, regulatory-compliant, and operationally scalable.

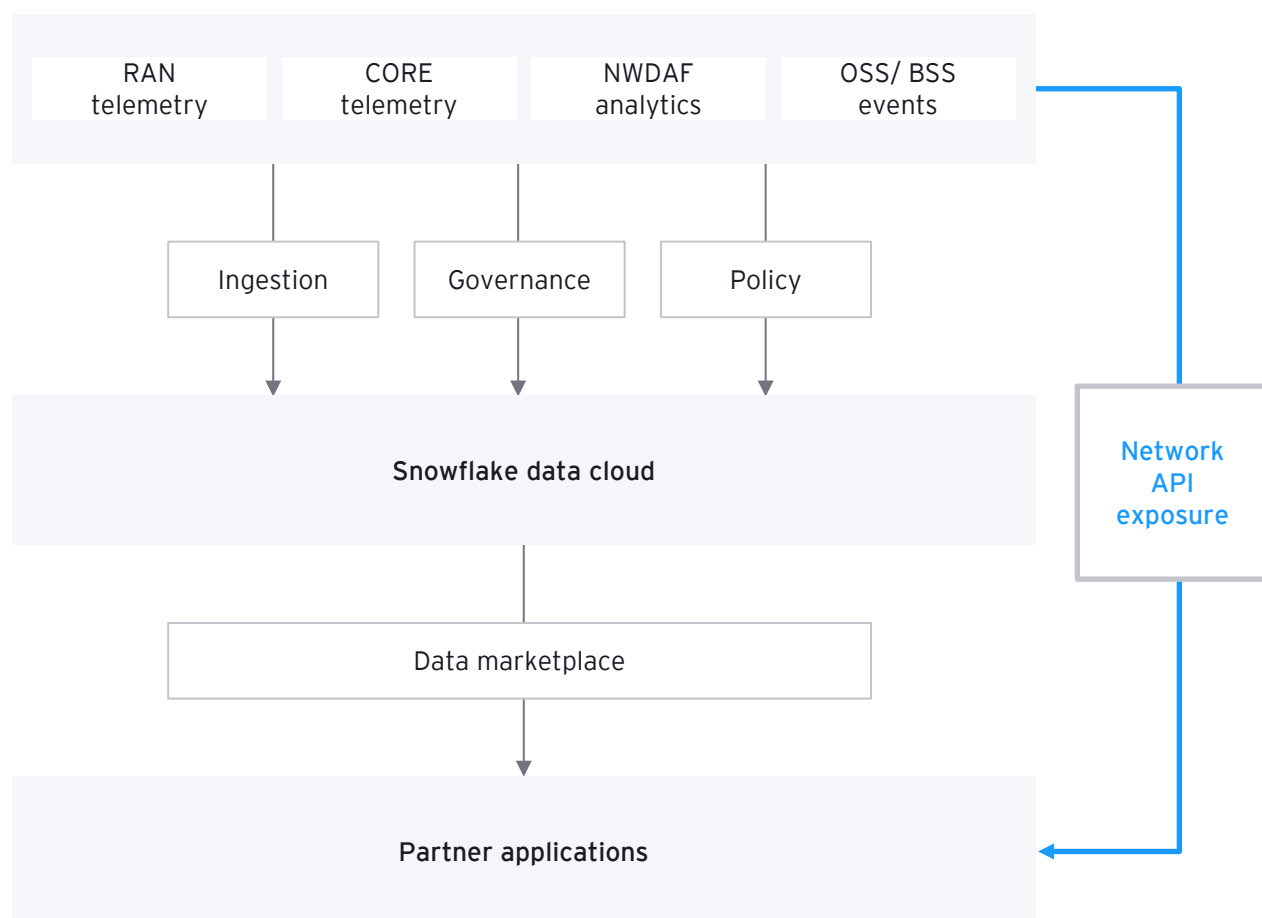
Technology enablers

Telecom operators possess some of the richest and most dynamic datasets in any industry. Historically, however, much of this intelligence has been trapped within siloed Operational Support Systems (OSS) and Business Support Systems (BSS), constrained by legacy network architectures, fragmented data estates and conservative data access practices.

changing this dynamic. The shift to 5G, open and cloud-native architectures, and modern data cloud platforms enable operators to unlock, harmonize and operationalize their data at scale. These technologies make it possible to expose trusted, governed, and real-time intelligence through standardized products and APIs.

As a result, data assets that were once inaccessible and operationally isolated can now be transformed into scalable monetization engines, powering new revenue streams, partner integrations, and real-time enterprise solutions.

Telecom data monetization architecture



The image shows three large satellite dishes positioned on a dark, silhouetted horizon. The sky above is a vibrant orange and yellow, suggesting a sunset or sunrise. The dishes are of varying sizes and are angled towards the sky. The overall scene is a high-contrast silhouette against a bright, warm background.

5G: From network evolution to data exposure

Before 5G, telecom networks operated on closed, hardware-centric architectures with limited real-time data access. Critical network and user data spanning RAN, Packet Core and transport layers remained locked inside proprietary systems. Extraction and commercialization of this data required complex integration, custom interfaces, and batch processing, making large-scale monetization costly and operationally impractical.

5G is more than a performance upgrade; it is an architectural reset. Its cloud-native core exposes granular, programmable, and near real-time signals that were previously inaccessible or too costly to operationalize at scale.

Network Data Analytics Function (NWDAF) and Service Based Interfaces (SBI) allow operators to stream network insights, events and performance indicators with unprecedented flexibility and fidelity.

When combined with modern analytics platforms and standardized API frameworks, 5G enables operators to transform raw network intelligence into enterprise-ready data products and programmable network APIs. This opens new avenues for monetization, unlocks revenue opportunities that were unattainable with legacy architectures.



5G as monetization catalyst

5G enables telecom operators to develop a fully programmable, cloud-native network fabric that exposes richer, real-time intelligence, creating a foundation for new digital services, partner ecosystems, and data-driven revenue models.

Several 5G capabilities make it a powerful catalyst for monetization:

- **Programmability:** The cloud-native 5G core allows external applications to request, verify, or influence network behavior through APIs. This transforms the network into a programmable platform rather than a static connectivity service.
- **Fine-grained visibility:** Operators gain access to telemetry, KPIs, quality indicators, and device-level signals with precision and timing suitable for enterprise use cases.
- **Data-exposure frameworks:** Key network components such as Network Data Analytics Function (NWDAF), Service-Based Architecture (SBA) events, and RAN Intelligent Controllers (RICs) generate high-fidelity analytics that support monetizable data products and real-time insight delivery.
- **Alignment with 6G trajectories:** Industry movement toward AI-native, data-driven architectures, reinforcing a long-term shift from monetizing connectivity to monetizing network intelligence and programmable capabilities.

1 Operators' core challenge: Turning abundant signals into usable products

Telecom operators have accumulated decades of Operations Support Systems (OSS)/ Business Support Systems (BSS) complexity. Each network generation introduces new data formats, semantics, and privacy considerations, resulting in a highly fragmented data landscape. Foundational signals vary widely across generations. For example, location data exists in 3G, 4G, and 5G, but differ substantially in precision, coverage, and reliability.

Core identifiers such as International Mobile Equipment Identity (IMEI) remain essential for network signaling yet sharing them directly can create considerable privacy risks. Similarly, telemetry captured across different technologies and vendors is inconsistent and requires extensive normalization before it becomes operationally useful or monetizable.

To monetize safely and at scale, operators need a unified logical data layer that harmonizes these signals across generations, vendors and domains while embedding privacy-preserving controls from day one. This foundational layer ensures that network intelligence can be exposed as governed, enterprise-grade data products and APIs without compromising trust or compliance.

2 First-party data provider considerations

Telecom operators act as first-party data providers offering continuous, consent-backed, and network-verified intelligence at scale. Moving into first-party data product territory requires operators to identify sources of unique value and to commercialize these assets responsibly, operators must:

- Aggregate and enrich signals – by integrating third-party datasets for added context
- Apply strict privacy and governance controls including anonymization, aggregation thresholds, purpose limitation and access policies
- Normalize and harmonize raw events across generations, vendors and domains
- Package insights into standardized data products with reusable schemas, business-ready semantics, and service-level expectations (freshness, coverage, availability, quality)

Examples of monetizable outputs include:

- Aggregated mobility heatmaps for retail planning, real estate assessment, transportation optimization and smart city capabilities
- Network telemetry for vendor optimization, device diagnostics and infrastructure optimization
- Dayparted demographic overlays (with compliant anonymization) for advertisers to enable more precise audience targeting and location-based advertising

3 Network API Provider Considerations

For operators choosing to expose network capabilities through APIs, success requires enterprise-grade rigor. APIs must be engineered to support mission-critical workflows such as fraud mitigation, identity assurance, and experience optimization.

Key considerations include:

- **Precision and reliability:** API responses must provide the fidelity required for high-value use cases such as fraud prevention, identity verification, or QoS orchestration
- **Privacy preservation:** APIs must prevent leakage of sensitive identifiers, enforce role-based access controls, and ensure that only privacy safe signals are exposed
- **Platform-grade operational controls:** Monetizable APIs require metering, rate limiting, authentication, observability, usage reporting, and service-level objectives
- **Developer experience:** Operators must provide documentation, SDKs, testing sandboxes, and onboarding workflows that match digital-native API platforms

Well-designed network APIs allow enterprises to embed telecom intelligence directly into their digital workflow for authentication, fraud scoring, real-time experience management, IoT automation and more...



The industry landscape and telecom data monetization use cases

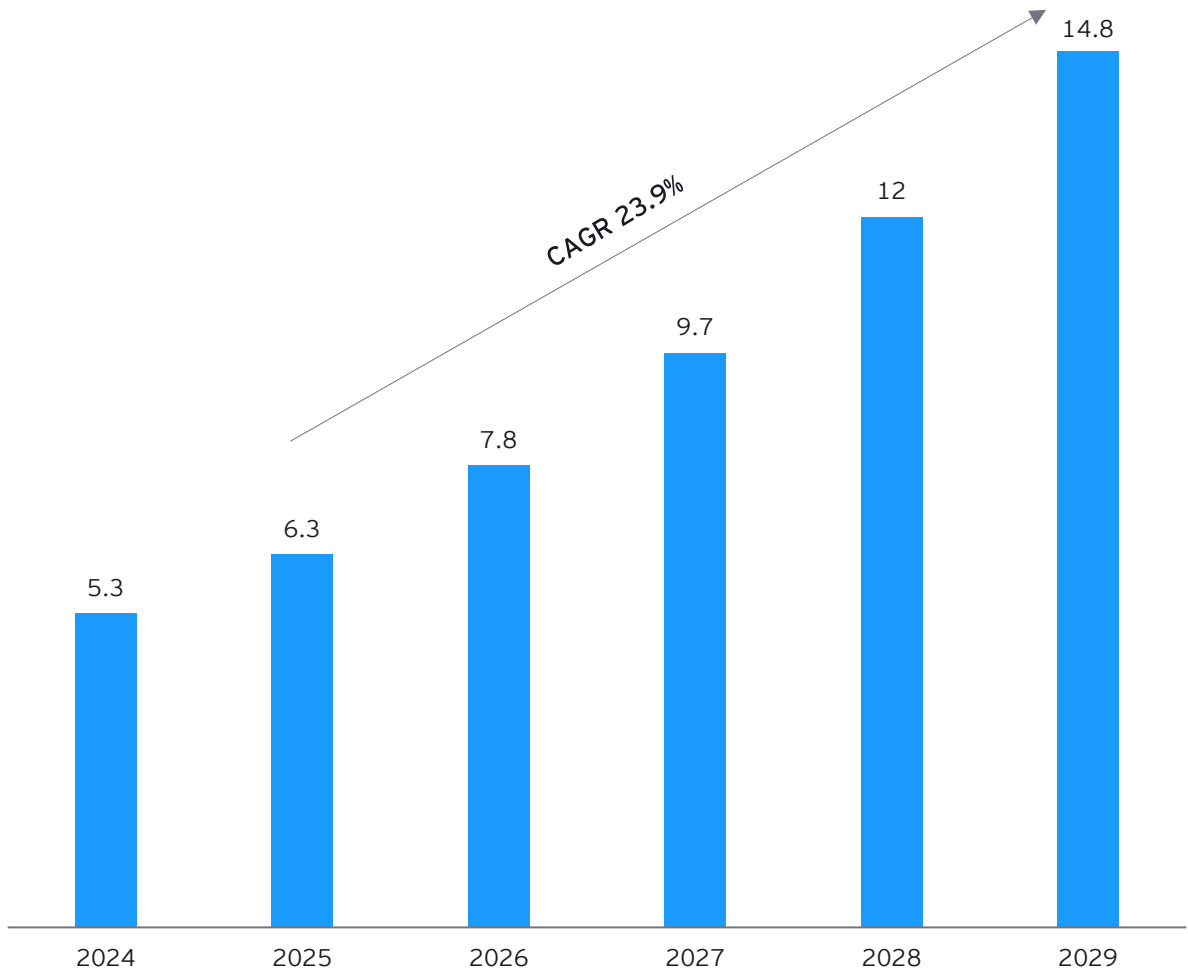
Telecom operators globally are moving beyond their traditional role as pure connectivity providers and transforming into platform businesses that expose intelligence, insights, and capabilities to enterprises. This shift is accelerating as the ecosystem aligns around standardized API frameworks such as GSMA Open Gateway and CAMARA project, providing developers access to key services such as device location, number verification and QoS control.

At the same time, maturing data privacy frameworks such as General Data Protection Regulation (GDPR) and emerging consent management standards are creating a clearer and more secure compliance environment for telecom data commercialization. These frameworks allow operators to safely offer privacy-preserving, governed datasets and real-time signals without exposing raw subscriber information.

The distribution landscape is also evolving. Hyperscalers and industry alliances are launching marketplaces and ecosystem hubs that streamline the publishing, discovery and monetization of telecom APIs and data products. For example, GSMA Open Gateway APIs are now accessible through cloud platforms such as AWS, Azure and other global marketplaces, making it significantly easier for developers and enterprises to integrate telecom intelligence into applications, workflows and AI models.

This convergence of standardized APIs, privacy frameworks and marketplace distribution is creating the conditions for data monetization at global scale, turning telecom network intelligence into essential input for digital transformation across industries.

Telecom data monetization market forecast (\$b)



Source: Business Research Company; Note: Data monetization in telecom refers to the practice of data monetization on unstructured data from the telecommunications industry to create valuable insights and obtain economically quantifiable benefits.

1

Industry landscape: Who is leading and what's working?

Across global markets, several telecom operators have moved early to monetize network intelligence, providing useful reference patterns for those building their own strategies. By combining telecom data with cloud-native platforms, standardized APIs and privacy frameworks, these operators have developed scalable, repeatable data and API product lines.

Major North American Telecom Operator

A major North American telecom operator launched a developer-ready set of standardized network APIs (Number Verify and SIM Swap Check) *to help enterprises strengthen digital identity assurance*. Built on CAMARA-aligned specifications and exposed directly from the operator's core network, these APIs enabled silent, real-time validation of device ownership and recent SIM swap activity without relying on SMS OTPs or app-layer signals.

What matters:

The operator's API-first model allowed digital banks, FinTechs, and ecommerce platforms to:

- Reduce account takeover fraud
- Streamline authentication for legitimate users
- Integrate high-trust, network-verified identity signals into risk engines

This unlocked a new monetizable product line based on exclusive network intelligence. This move accelerated its shift toward platform-based revenue and demonstrated how network APIs such as device status, Quality-on-Demand (QoD), and location verification *can deliver scalable value across finance, retail, logistics, and public safety sectors as Open Gateway adoption accelerates*.

Leading European Telecom Operator

Telecom operator has built a **developer-centric API marketplace** through its Magenta API capability exposure unit. The company commercially delivers **5G network slicing**, real-time device insights, and standardized Open Gateway APIs. The strategy underscores a shift toward programmable infrastructure and consumption-based product revenue.

What matters:

Operator succeeds by:

- Maintaining strong API documentation and developer focus
- Pursuing a partner-first go-to-market approach
- Collaborating with partners such as LotusFlare to power the Magenta API Service Exposure Platform
- Exposing APIs such as SIM SWAP, Number Verify, and Quality-on-Demand via platforms such as Vonage

This approach positions operator as a leader in programmable infrastructure and consumption-based revenue.

Leading Southeast Asian Telecom Operator

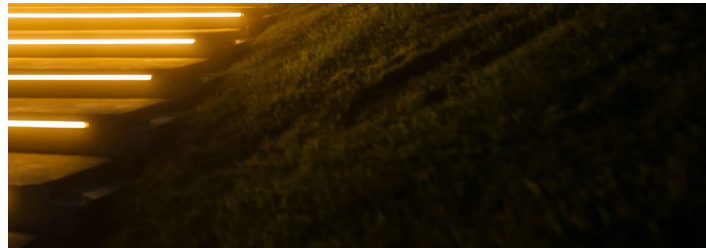
Telecom operator's *Paragon* platform integrates **Network-as-a-Service (NaaS)**, **edge compute**, **application orchestration**, and **API exposure** under one unified environment. Its DataSpark unit also commercializes **mobility analytics** for cities, insurers, and retailers.

What matters:

Operator demonstrates the power of convergence:

- Data, API, edge and orchestration
- Unified enterprise experience
- Outcome based monetization models

Paragon has driven strong adoption across enterprises and public sector organizations by simplifying orchestration, improving latency and reducing operational overhead, leading to faster time-to-value for customers.



Leading Spanish Telecom Operator

Telecom operator's dedicated analytics unit - positioned as a specialized insights provider and discussed within Harvard's Digital Innovation platform - illustrates how operators are delivering enterprise data solutions based on large-scale network data assets. The operator leverages extensive historical activity data across large customer bases to generate actionable insights for enterprise use cases. Together with Open Gateway APIs, operator provides **real-time data services** for multiple sectors like FinTech, transportation, and media.

What matters:

Operator differentiation comes from:

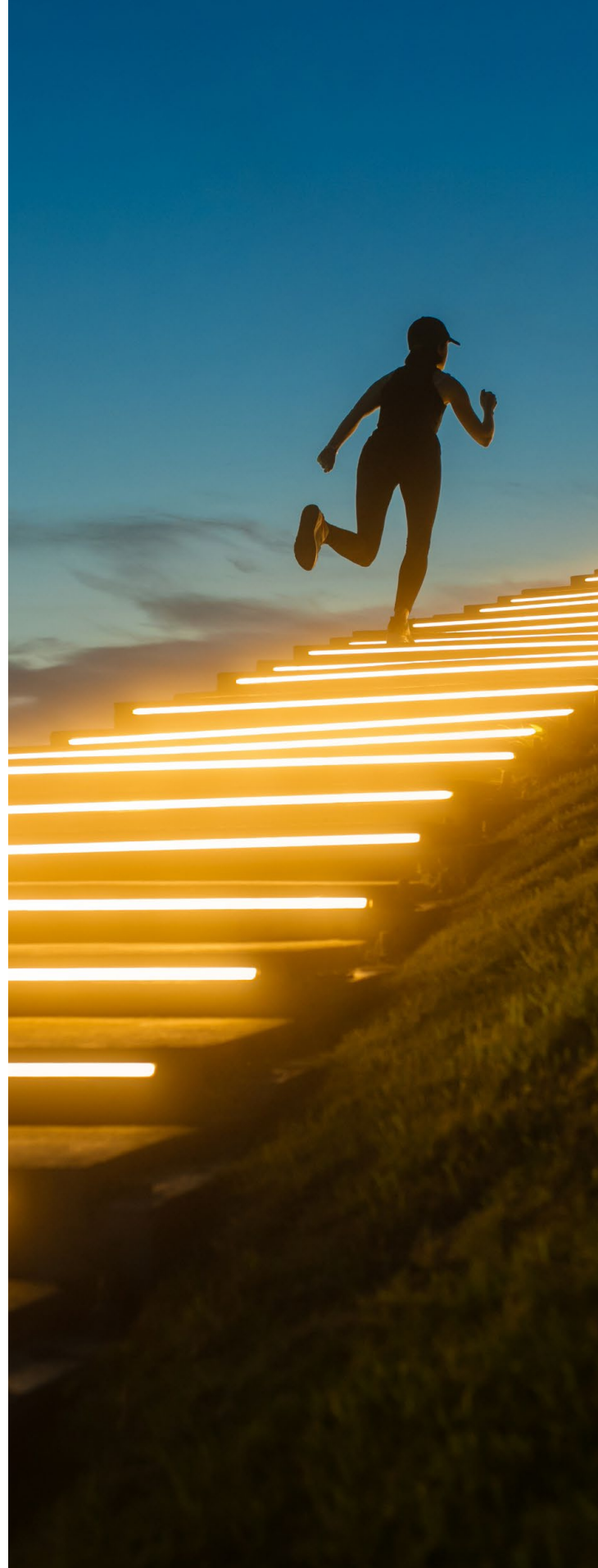
- Robust internal data governance
- Clean room-based partnerships for privacy safe collaboration
- More than 50 ecosystem partnerships for real-time APIs such as number verification and age verification.

Operator demonstrates how combining NWDAF powered insights with standardized APIs creates a scalable, monetizable intelligence layer.

2

Emerging pattern across leaders

1. **APIs + Data products:** Leading operators monetize both transactional APIs *and* insight driven data products. This dual portfolio captures both real-time and batch driven demand.
2. **Platforms:** Across leaders, internal modernization (data unification, clean rooms, API gateways) precedes external monetization. Operators are bringing together data, clean rooms, API gateways, and orchestration into a cohesive stack/platform. This foundation enables repeatable, scalable monetization rather than siloed, one-off use cases.
3. **Developer ecosystems:** Adoption accelerates when developers get frictionless integration through SDKs, sandboxes, sample apps, and clear documentation. This approach increases API consumption across digital apps, enterprises, and government.
4. **Strong governance:** Privacy-by-design architecture, masking, anonymization, and compliant aggregation are now core differentiators. Strong governance builds trust with regulated industries, unlocking sensitive, high-value markets like finance, healthcare, mobility, and public sector.



Internal monetization use cases (operational value creation)

Internal monetization is not about “selling data”; it is about unlocking additional value from existing network intelligence to reduce costs, improve network experience, and enable decision making across the operator’s own organization. By applying analytics, automation and AI to the signals already generated across AN, core, transport, OSS, and BSS systems, operators can materially improve operational efficiency, asset utilization and customer experience.

These internal use cases build the models, data pipelines, governance foundations, and operational confidence that later power external offerings. Capabilities such as mobility models, anomaly detection, segmentation, device-level insights, and QoS analytics become the building blocks for external-facing data products and standardized network APIs.



Network optimization and predictive operations

Operators can centralize 4G, 5G, and ORAN telemetry into cloud-native platforms such as Snowflake's data platform to enable predictive maintenance, automated anomaly detection, dynamic spectrum allocation, and energy-efficient optimization across RAN and core-RAN.

AI further enhances these capabilities by generating device-level experience maps, predictive congestion forecasts, and automated network experience scoring – *reducing operational costs and improving customer experience.*

Fraud prevention and security operations

By analysing network-native signals such as SIM swap behaviour, call-signalling anomalies, irregular mobility trails, and device identity inconsistencies, operators can detect fraud and security threats long before they impact customers. These internal models, built from proprietary telemetry and years of historical patterns, often form the foundation for external-facing fraud and prevention APIs such as Number Verification, SIM Swap Check, or Device Status APIs. As these models mature, they evolve from purely internal protection tools into commercial security products that banks, FinTechs, digital platforms, and government agencies can consume to harden their own identity and transaction workflows.

Customer experience and commercial analytics

By unifying behavioural, network, and device level data into a single intelligence layer, operators can generate real-time insights such as churn risk scoring, per-user or per-segment network experience ratings, device health and firmware performance scores, and application or streaming quality assessments.

These AI-driven insights feed directly into commercial decisioning – informing product design, personalized pricing, campaign targeting, and retention strategies – *allowing operators to intervene proactively and optimize customer lifetime value.*

Vertical specific internal value

Certain verticals such as sports venues, large events, enterprise connectivity, and industrial IoT, create high-value internal monetization opportunities. Operators can apply real-time venue analytics, congestion and mobility-flow insights, VPN/SASE experience scoring, and IoT anomaly detection to improve operations and reduce costs. These vertical-specific capabilities often become templates for future external products.

Internal use cases are the proving ground, establishing the governance, models, and operational confidence required to scale monetization externally.



External monetization use cases (commercial revenue creation)

External monetization converts network intelligence into **products** that enterprises consume to power digital workflows, risk engines, marketing models, and real-time decisioning. Operators can create new revenue streams by packaging telecom data, analytics, and APIs into consumable industry specific services. Key use cases include:

Location intelligence and urban mobility analytics

Operators provide anonymized, aggregated mobility insights that serve a broad range of enterprise needs, including:

- **Retail:** Store placement, footfall analysis, competitive trade-area modeling
- **Cities and transit agencies:** Transportation planning, pedestrian management, congestion prediction, event day mobility coordination
- **Advertising:** Geofenced targeting, out of home measurement, attribution modeling-of-home measurement, attribution modeling

- **Event operators:** Crowd movement forecasting, queue management, real-time staffing and safety optimization-movement forecasting, queue management, real-time staffing and safety optimization

These insights convert raw mobility trails into operationally actionable intelligence that improves planning, marketing efficiency, and public safety outcomes.

Examples:

- *Leading Spanish Telecom Operator's LUCA* provides Smart Steps mobility analytics across Europe and LATAM.
- *Leading Southeast Asian Telecom Operator's DataSpark* delivers transport and mobility insights across Singapore and Australia.

Fraud, identity verification and risk APIs

Fraud and identity verification-APIs are among the highest value telecom monetization offerings because they deliver deterministic, network-verified signals that cannot be replicated by application-layer or device-side solutions.

Common capabilities include:

- SIM swap detection
- Silent number verification (no OTP required)
- Device in area confirmation
- Line integrity and status checks

Banks, FinTechs, and digital platforms rapidly adopt these APIs to:

- Prevent account takeover and social engineering attacks-engineering attacks
- Reduce false positives in fraud models
- Secure high value transactions
- Strengthen authentication without user friction

These APIs consistently demonstrate strong ROI and fast enterprise adoption.

Network-as-a-Service (NaaS)

Network-as-a-Service enables enterprises and developers to programmatically control network behavior via standardized APIs. NaaS offerings typically include:

- Configurable QoS
- On demand slice allocation
- Edge orchestration
- Location aware routing-aware routing

These capabilities allow enterprises to deliver low-latency, mission critical services - from industrial robotics to live media production - with far greater precision and predictability.

The GSMA Open Gateway framework is accelerating global adoption by standardizing these APIs, reducing fragmentation, and making network programmability easier for developers to consume across operators and clouds.

Marketplace data products

Operators increasingly publish curated, ready to use datasets on platforms such as:

- Snowflake Marketplace
- AWS, Azure, and GCP data exchanges

Typical dataset categories include:

- Mobility and footfall insights
- Device behavior summaries
- Network experience metrics
- Roaming and tourism patterns
- Fraud risk indicators
- Geospatial retail and demographic overlays

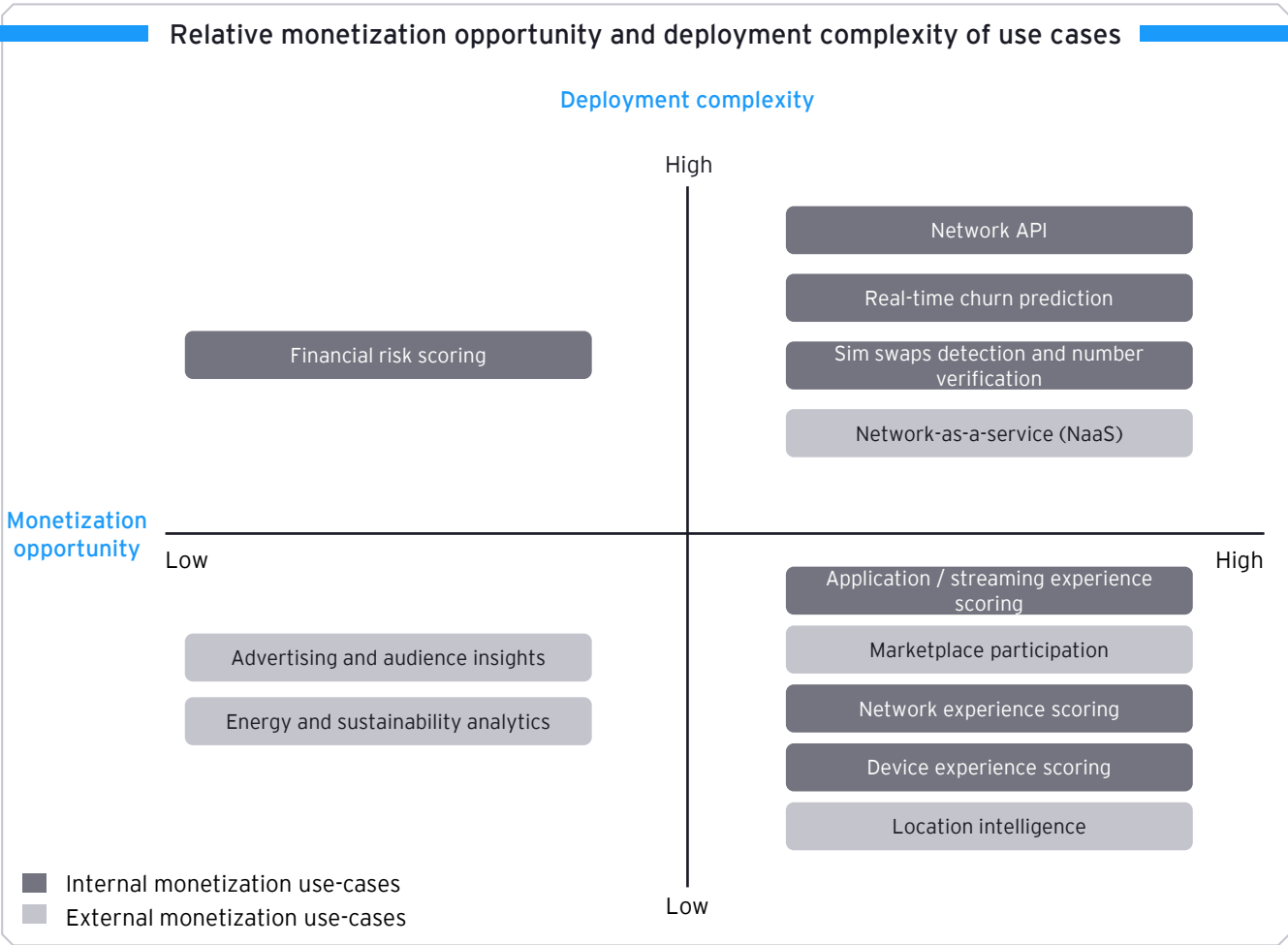
These datasets come with clean schemas, documentation, and clear governance, dramatically reducing procurement friction. Enterprises gain instant access through point and click subscription, while operators expand their monetization reach with repeatable, low touch distribution and click subscription, while operators expand their monetization reach with touch distribution.

GenAI-enabled offerings

GenAI enables operators to transform raw network telemetry into high value, synthetic, predictive, and explainable intelligence products, such as:

- Privacy-preserving mobility cohorts-preserving mobility cohorts
- Digital twins for cities, retail corridors, stadiums, or logistics hubs
- AI-generated demand forecasts-generated demand forecasts
- Automated anomaly explanations that translate complex signals into actionable insights
- Predictive network experience layers that enhance IoT, streaming, gaming, and AR applications

These capabilities allow operators to launch premium analytics services, differentiate against competitors, and unlock higher margin monetization opportunities.



Monetization playbook: A practical path to execution

Even with strong enablers, telecom monetization succeeds only when supported by disciplined product management, cross-functional governance, and clear commercial alignment. The following **Foundation** → **Acceleration** → **Scale** playbook provides a pragmatic blueprint for operators at any stage of maturity.

By the end of this stage, operators achieve:

- A mature, diversified monetization portfolio with predictable revenue growth
- A fully operational product organization with clear accountability and governance
- A refreshed and expanding portfolio of data products and APIs
- A global ecosystem of developers, partners, and marketplaces actively driving scale.



1 Foundation: Build the data and API backbone

The foundation stage establishes the structural and governance baseline required to monetize telecom data products reliably and securely. The objective at this stage focuses on essential prerequisites that can help build the foundation, reduce internal friction, and enable value creation and favorable outcomes required as part of this exercise.

The essential prerequisites required for establishing a solid foundation include:

Data and governance foundation

Operators must establish a unified, governed data layer that spans legacy and modern network generations. Core elements include:

- A logical data layer harmonizing 3G/4G/5G signals
- Privacy by design controls: aggregation, masking, minimization
- Clean rooms for secure multi-party analytics
- Standardized semantics and telemetry harmonization to reduce downstream complexity

These capabilities create trust, compliance, and consistency which serve as critical prerequisites before any external exposure.

Technology enablers

Operators must implement the core platform capabilities that will later support commercial products:

- API exposure architecture (aligned with Open Gateway and CAMARA)
- Cloud-native data platforms for scalable storage, transformation, and data sharing-native data platforms for scalable storage, transformation, and data sharing
- AI-driven automation for cataloging, segmentation, data quality checks, governance operations, and metadata management

These enablers create the operational backbone required for both internal and external monetization.

Internal proof points

Early internal wins demonstrate that the underlying data, models, and governance processes work at scale. Typical proof points include:

- Predictive network analytics
- Churn and customer experience scoring
- Fraud and SIM swap anomaly detection

These internal use cases validate the data layer, AI pipelines, and operational workflows, proving readiness for external commercialization.

Outcome of the foundation stage

By the end of this phase, operators have:

- A foundational capability stack
- A centralized and governed data foundation
- Two to three validated internal use cases that demonstrate technical readiness and organizational alignment



2 Acceleration: Initial productization and market entry

The Acceleration stage focuses on transforming the foundational data and API architecture into tangible, revenue-generating products. At this point, operators begin commercializing a select set of high-value data products and APIs, prioritizing offerings with short time-to-revenue, clear enterprise demand, and low operational friction.

This stage validates pricing models, product-market fit, ecosystem readiness, and customer adoption patterns. Internal pilots evolve into externally consumable offerings, and operators begin onboarding these into marketplaces and partner channels. The overarching goal is to demonstrate repeatable, early monetization patterns that justify further investment and organizational scale-up.

Key activities in the acceleration stage:

Define and package select set of first-party data products

This step involves conversion of raw internal datasets into well-formed, enterprise-ready data products. Each product should have a clear problem statement, target industry, aligned data dictionaries and metadata, access and consumption policies, privacy, consent and commercialization models. This marks a shift: allowing operators to start behaving like a product company, rather than just a data owner or aggregator. A small, well-rounded, high-value portfolio of standardized data products can help operators test the market demand, validate pricing assumptions, and gather early adoption signals.

- **Launch a set of high-value APIs:** Operators should prioritize APIs with immediate enterprise demand, such as identity verification, fraud scoring, location validation, SIM swap, device verification, or QoS control. These APIs offer clear, usage-based monetization potential, strong demand in verticals like BFSI, e-commerce, FinTech, and logistics. They are also typically characterized by lower operational complexity and faster integration capability.
- **Publish early products to marketplace:** Migrating products and APIs to a marketplace or telco-hosted API hub helps with easy discovery and lowers friction for commercial uptake. Early marketplace presence helps gather feedback signals including queries, marketplace interest, trial requests, and patterns of early adoption.

- **Establish product P&L along with commercial ownership:** Having clear accountability around the P&L for each early product family is important to accelerate monetization. This includes having metrics such as - defined owners, backlog, roadmap, release cadence, usage metrics, churns and cross-functional alignment across functional teams involved. This is an essential step to ensure that monetization is not treated as a side-initiative, but as a genuine business line with ownership and financial rigor.
- **Create a developer experience (DX) layer:** Developers act as the primary route to scalability so it's essential that operators invest early in providing a frictionless development experience through a modern and intuitive developer portal along with other important elements including clear API documentation, code samples, reference applications, sandbox/test environments to lower adoption barriers, usage dashboards, client-side libraries, onboarding flows and feedback channels for rapid iteration.
- **Stand-up sales operationalization:** To convert products into revenue, operators must equip sales teams with the tools and assets needed to sell effectively. This includes sales enablement and pricing guides, market segmentation, and early pipeline development.

Outcome of the acceleration stage

By the end of this phase, operators have:

- A functional early portfolio of APIs and data products
- Clear go-to-market (GTM) assets and sales enablement
- Early customer adoption and validated demand signals
- A qualified commercial pipeline
- Improved internal confidence and organizational alignment

With products now published, discoverable, and supported by structured GTM motion, commercial teams can articulate value clearly, target the right customer segments, and build early deal momentum.

3 Scale: Institutionalize monetization into recurring growth

This stage represents the transition from early commercialization to a fully industrialized monetization business. Operators now institutionalize the monetization operating models into a repeatable, diversified revenue engine. This requires expanding the product and API catalog, maturing developer ecosystem, and building global distribution channels. The goal is to shift to a full-fledged data and API business line with predictable, recurring revenue.

This can be achieved through the following:

Expand and diversify the monetization portfolio:

Product offerings validated from the acceleration stage can help the organization with SKU footprint expansion, typically expanding to:

- 10-20+ data products
- 5-10 APIs across multiple verticals

Introducing advanced, AI-enabled SKUs, such as predictive analytics and network digital twins, further strengthens portfolio diversification. Such expansion and depth highlight the evolving catalog of offerings rather than a few niche products, thus strengthening the overall positioning as a data-driven enterprise with multiple revenue streams.

Scale and industrialize the developer ecosystem:

Developers and partners can help accelerate adoption at scale. To support this, the operators need to move from basic documentation to a full, robust ecosystem, including:

- Developer programs with certifications
- Hackathons and innovation challenges
- Partner co-build programs to create industry focused solutions
- Deep technical support and automated onboarding workflows

Integrate with enterprise workflows: For scalability, APIs and data products seamlessly integrate into day-to-day enterprise operations, including payments, logistics, identity, mobility and customer experience (CX). Deep workflow integration allows operators to move beyond basic “Data Delivery” to being integral part of mission-critical enterprise functions.

Establish global distribution channels: To unlock full monetization potential, products must be discoverable and consumable across regions and industries. This requires:

- Alignment with open gateway global standards for API interoperability
- Distribution across multiple marketplaces and partner ecosystems
- Standardization of packaging to sell across geographies to establish global availability, enhancing the demand and revenue predictability

Continuous optimization and executive-level KPIs:

At scale, monetization success must be measured and optimized through defined metrics such as:

- Product and API usage tracking
- SLO compliance
- Customer satisfaction and retention
- Attach rates and revenue per SKU

These metrics inform portfolio decisions, roadmap prioritization, and leadership decisions around investment allocation.

Outcome of the scale stage

- By the end of this phase, operators have:
- A mature, diversified monetization revenue stream with predictable year over year growth
 - A fully operational product organization with strong governance and accountability
 - A refreshed and expanding portfolio of data products and programmable network APIs
 - A global ecosystem of developers, partners, and marketplaces actively driving scale and innovation

This represents the transition from telecom operator to data and API platform business, capable of sustained, high margin growth.

Executive leadership gains clear visibility through monetization KPIs embedded into C-suite dashboards, reinforcing monetization as a core growth engine rather than an adjacent initiative.

Some key monetization KPIs for executives:

Category	KPI	Why it matters
Growth	Attach rate	Indicates cross-sell success across products/APIs
Adoption	API calls / dataset reads	Core signal of customer value realization
Efficiency	Time-to-market	Measures productization maturity and agility
Quality	SLO adherence	Ensure trust and reliability
Financial	Revenue per SKU / per customer	Shows strength of commercial model
Operational	Churn reduction / MTTR reduction	Internal ROI that justifies reinvestment





Executive takeaway

Success will favor operators that treat data as a strategic business, not just another technology initiative. Industry leaders will build a unified, well-governed data foundation that becomes the backbone for all monetization efforts. They will advance on both commercial pathways, launching differentiated data products and exposing scalable, standardized network APIs.

Winners will invest early in the capabilities that matter most:

- Product management that drives clear commercial outcomes
- Seamless developer experience that accelerates adoption and ecosystem growth
- Effective sales and GTM operations equipped to articulate value, segment markets, and close deals with confidence

Operators that recognize network intelligence as a renewable growth engine, one that increases in value as it is continuously refreshed, governed, and productized, will outperform their peers. For these leaders, monetization is not a technology project, but a durable, scalable revenue engine that strengthens competitive advantage.

This playbook enables operators to transform monetization from isolated pilots into a repeatable, enterprise-scale growth model.



Risks and considerations

Monetizing telecom data and network intelligence requires more than technical readiness; it demands disciplined oversight across privacy, security, interoperability, and organizational capability.

These domains determine not only commercial viability, but also trust with regulators, partners, and enterprise customers. The operators that succeed establish **mature guardrails** before scaling monetization efforts.

Below are the **five** critical domains of risk and the executive-level considerations for each:

1 Data privacy and compliance

Telecom data is among the most regulated categories worldwide. Any monetization, internal or external, must be architected around privacy-by-design and compliance with GDPR, CCPA, regional telecom regulations, and emerging consent-management standards.

Key risks include:

- Exposing identifiable subscriber information
- Cross-border data transfer challenges
- Use case creep
- Inconsistent compliance across markets

To mitigate these, operators apply strong aggregation thresholds, use data clean rooms for multiparty collaboration, enforce region-specific governance, conduct Data Protection Impact Assessments (DPIA) for every product or API, and maintain tight retention and revocation controls. Mature organizations embed privacy protections natively within every data pipeline, ensuring controls are automated, consistently enforced, and fully auditable from end-to-end instead of being bolted on post-launch.

2 Security and API protection

Exposing data products and network APIs expand operator's attack surface, increasing risk for critical functions such as device verification and SIM swap detection. As the ecosystem expands, key risks such as credential abuse, API enumeration, injection attacks, and compromised partner integrations come into the picture.

To mitigate these, operators implement strong authentication and authorization, apply Zero-Trust access, enforce dynamic rate limiting and anomaly detection, maintain immutable audit and lineage logs, and adopt standardized security profiles from CAMARA/Open Gateway to ensure consistent protection across all exposed capabilities.

3 Interoperability and legacy complexity

Legacy OSS/BSS systems remain major blockers for monetization. Without a unified data layer and consistent semantics across generations, data products may lack reliability, and APIs may not perform at enterprise-grade levels.

These issues cause integration cycle delays and introduce normalization gaps that undermine product quality. Operators address this by implementing unified logical data models across

generations and building transformation pipelines that standardize location, telemetry, and signalling semantics into a consistent, high-trust data layer.

4 Organizational readiness and operating model

Monetization is not a technical project; it is a business capability. Without dedicated product roles, pricing governance, developer support, and cross-functional alignment, even well-designed products fail to scale.

Key risks include unclear P&L responsibility, fragmented pricing decisions, unprepared sales channels, weak developer onboarding, and misalignment across legal, privacy, and product teams.

Telecom operators address this by adopting a product-centric operating model with defined data and API product owners, establishing pricing councils, investing in developer ecosystem support (portals, SDKs, documentation), enabling sales with playbooks and pricing guides, and enforcing cross-functional governance across legal, privacy, security, data, and network domains.

5 Go-To-Market (GTM) dynamics and competitive positioning

As data products and APIs mature, go-to-market execution becomes a key differentiator for operators. Selecting the right distribution model becomes critical—whether through aggregators, cloud marketplaces, direct enterprise sales, or hybrid partnerships—while clearly articulating how telco-grade intelligence differs from hyperscaler analytics.

Pricing must align to business outcomes (such as verified identities, QoS events, or mobility insights), and targeted vertical partnerships in areas like payments, logistics, media, and smart cities help package offerings into solutions that accelerate adoption and strengthen competitive positioning.



Conclusion and strategic recommendations

Telecom operators stand at a pivotal moment. The shift from connectivity to **intelligence-driven value** is accelerating, and operators hold unique, irreplaceable assets: network insights, mobility signals, device intelligence, and programmable network capabilities. These assets, when packaged and governed properly, unlock scalable monetization through **data products**, **APIs**, and **ecosystem partnerships**.

The winners will be the operators who transform into **data-product companies**, with the operating models, governance, and commercialization motions to match.

Four strategic recommendations for executives

- 1. Treat network intelligence as a first-class product:** Formalize data and API product roles, establish product P&Ls, enforce data contracts and SLOs, and adopt structured lifecycle management. Move from ad hoc data delivery to governed, repeatable product releases.
- 2. Build a dual monetization engine (Data products + APIs):** Each pathway caters to different customers and revenue models. Data products enable insight-led decision making, while APIs power real-time transactions and operational integration. When operators combine both, they build a diversified, defensible foundation that generates strong and recurring revenue streams.
- 3. Invest early in developer experience and ecosystem building:** Adoption accelerates when developers can integrate easily. A strong portal, SDKs, sandbox environment, and commercial documentation are not optional. Partnerships with hyperscalers, FinTechs, and vertical solution providers amplify reach.
- 4. Prioritize governance, privacy, and security as your differentiators:** In a world increasingly concerned with data ethics and digital trust, the operator who demonstrates **privacy-by-design**, **secure-by-default**, and **regulatory alignment** becomes the preferred partner for enterprises and governments.

Closing perspective

The opportunity ahead is unmistakable: Operators that evolve into platform-centric, data-driven organizations will capture new growth, strengthen their relevance to enterprises, and shape the next generation of digital ecosystems. Network intelligence, once locked deep within infrastructure, now stands ready to become a strategic asset and a foundation for durable revenue.

EY brings deep expertise in strategy, architecture, data governance, product management and monetization operating models, while Snowflake provides a scalable, secure data cloud and vibrant marketplace ecosystem. Together, these capabilities create a proven pathway for operators to accelerate their transformation and operationalize monetization at scale. Telecom operators already possess the infrastructure, the data, and the trust. Now is the moment to convert those strengths into sustained, high-quality growth.





Glossary of terms

- **5G SA:** A deployment model where 5G operates independently of 4G infrastructure, using a cloud-native core network to deliver advanced features like ultra-low latency, network slicing, and higher scalability.
- **Anonymization:** Removing identifying information from datasets.
- **API exposure:** Making APIs available securely.
- **API gateways:** Tools managing API traffic and security.
- **API:** Software interface enabling system interactions; in telecom, used to expose network capabilities.
- **Business Support Systems (BSS):** Systems managing telecom business functions like billing.
- **Call signaling anomalies:** Unusual call behavior indicating fraud
- **CAMARA:** Open-source project defining standardized telecom APIs
- **Cellular connectivity:** Wireless connectivity through mobile networks.
- **Data clean room:** Secure environments where multiple parties can combine and analyze data without exposing raw datasets. Used for privacy-preserving analytics and collaboration, often in advertising or telecom data monetization.
- **Data products:** Packaged telecom datasets built for reuse.
- **Data Protection Impact Assessments (DPIAs):** Assessment of privacy risks in data projects.
- **Data sharing:** Exchange of telecom-generated data (e.g., location, network performance, subscriber insights) with internal teams or external partners, under strict privacy, security, and compliance frameworks.
- **Data unification:** Combining data from multiple sources.
- **Data-as-a-product:** Data treated as governed, reusable products.
- **Device identity inconsistencies:** Mismatch in device identity attributes.
- **Device in area confirmation:** Confirming device presence in location.
- **Downlink traffic:** Data sent from network to device.
- **Dynamic spectrum allocation:** Automatic allocation of radio spectrum.
- **Event packs:** Structured bundles of network events provided for analytics.

- **First party data:** Data collected directly by an organization from its own customers or network (e.g., usage patterns, location pings, billing info), considered highly accurate and privacy-compliant compared to third-party data.
- **Fixed Wireless Access (FWA):** Internet access using mobile networks for homes/businesses.
- **Gen5/event-driven/intent-ready:** Next-gen architecture triggered by real-time events.
- **GSMA open gateway:** Framework standardizing network APIs for cross-operator access.
- **Irregular mobility trails:** Suspicious movement patterns.
- **Line integrity checks:** Checks to ensure mobile line integrity.
- **Location based advertising:** Advertising targeted using aggregated mobility data.
- **Location intelligence:** Insights using aggregated mobility data.
- **LotusFlare:** Digital BSS platform provider.
- **Magenta API Service:** Deutsche Telekom's API marketplace.
- **Mean Time to Repair (MTTR):** Average time to repair telecom failures
- **Mobile traffic:** Mobile network data traffic refers to the total volume of data transmitted across mobile networks, generated by all active devices and services using cellular connectivity. It encompasses uplink and downlink data from smartphones, IoT devices, mobile broadband, and other applications, and is typically measured in exabytes per month.
- **Network API:** An application programming interface exposed by telecom operators that provides network-level capabilities (e.g., device location verification, QoS control, fraud checks) to developers, enabling new services without revealing sensitive user data.
- **Network Data Analytics Function (NWDAF):** 5G function analyzing telecom network data for optimization.
- **Network-as-a-Service (NaaS):** Providing network services via API
- **Number verify:** API verifying a user's phone number.
- **Open gateway APIs:** Standardized telco APIs.
- **Open Radio Access Network (RAN):** Flexible radio network architecture allowing multi-vendor interoperability.
- **Operational Support Systems (OSS):** Systems managing telecom network operations.
- **Programmable network behavior:** Ability to program and influence network operations.
- **Quality of Service (QoS):** Controls ensuring network performance.
- **Quality-on-Demand (QoD):** Temporary performance boosts via network.
- **Radio Access Network (RAN):** Radio access portion of telecom networks.
- **RAN Intelligent Controllers (RICs):** Controllers optimizing radio networks using AI.
- **Service-Based Architecture (SBA) events:** Real-time 5G core events.
- **Silent number verification:** Silent verification of mobile numbers.
- **SIM SWAP:** Fraud API detecting SIM replacement.
- **Slicing:** Virtual networks with dedicated performance.
- **Synthetic data:** Artificially generated data mimicking real datasets.
- **Telecom communications providers revenue:** It includes revenue from telecom connectivity and services. Revenue from hyperscaler is not included.
- **TM Forum Open APIs:** Standard APIs for telecom operations.
- **Uplink traffic:** Data sent from device to network.
- **Urban Mobility Analytics:** City-level
- **Vonage:** Cloud communications API provider.



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ID: 459988
ED 01012027

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