TELECOM INFRA PROJECT®

2025: TIP's Year in Review

Contents

TELECOM INFRA PROJECT®

Introduction

As 2025 draws to a close, the Telecom Infra Project community has much to celebrate, from ground-breaking technical achievements and new global partnerships, to record-breaking engagement at FYUZ.

Our community has navigated industry shifts, doubled down on innovation, and continued to deliver on our mission of driving infrastructure solutions to advance global connectivity.

Here's a look back at what we accomplished together in 2025, and what's coming next.

TIP by the Numbers

Participant Organizations
125

Activated Members
900+

Companies involved in active Test & Validation
40+

Technical Requirements Documents (TRDs) released or updated
7

TIP Badges awarded
9

Project Groups refreshed for 2026 alignment
5

New LinkedIn followers per month
300

Community Growth

In 2025, we welcomed new Sponsor Participants to TIP, each bringing strategic value, technical expertise, and strong alignment to our mission.

Amazon Web Services
Cloud infrastructure, hyperscale collaboration

EchoStar
Satellite innovation, integrated telco use cases

TELUS
Operator engagement across OpenRAN and TelcoAI

Community Growth

Along with the strong additions to our Sponsor class, TIP also increased its General Participant community with new joiners, further strengthening and diversifying our member base. We were pleased to welcome these organizations to the TIP community, and look forward to continued engagement in 2026.

802.11 Networks
Airspan
AmpliTech Group
Arilia Networks
Azores Networks
Celestica International
Emplus Technologies
Federant (formerly StellarIoT)
Fraunhofer Heinrich Hertz Institute (HHI)
FS.COM
Gemtek Technology
HPE
Infernet System
Latigo
National Taiwan University of Science and Technology
Nearhop Internet Technologies
NETGEAR
NextNet
Nova Labs
Parallel Wireless
Rakuten
Ribbon
Smartoptics
SURF B.V.
Tejas Networks
Telkom University
Zinkworks
Zyxel Networks

Leadership Updates

After an 8-year tenure, **Caroline Chan**, formerly of Intel, stepped down from her role as a TIP Board Member and TIP President. We were pleased to welcome **Cristina Rodriguez** from Intel to the TIP Board of Directors as a Board Member, as well as the appointment of **Francisco Martín** of Vodafone, already a Board Member, as our President.

Caroline Chan

Francisco Martín

Cristina Rodriguez

Industry Events: TIP Leadership & Community in the Field

MWC 2025
March 3 - 6

45 TIP-bilateral meetings and a TIP Board-hosted executive networking reception, solidifying 2025 community participation

OFC 2025
March 30

TIP OOPT: Joint demonstrations with IOWN Global Forum and OpenROADM MSA, highlighting open optical transport innovation

Telco AI Forum 2025
June 10

TIP Telco AI: Panel session with TIP, Telenor, Reliance Jio, and Tiscali, discussing scaling AI for Networks

Rakuten Symphony: Zero-Touch Live
October 16

Programmable & Autonomous Networks: Fireside with Rakuten Symphony CMO Geoff Hollingworth and Kristian Toivo, Executive Director of TIP

OpenRAN in Indonesia
December 2

Organized by Komdigi and USTDA, TIP presented the feasibility of deploying OpenRAN across rural Indonesia

UK TIN Connected Reflections
March 19

TIP OpenRAN: Promotion of the UK DSIT ONE TIP project, ARIANE

NetworkX Americas 2025
May 20 - 22

TIP Telco AI: A high-impact, TIP-hosted breakfast session and panel session with AT&T, TELUS, AWS, EchoStar, and Supermicro, discussing AI for Networks and Networks for AI

HITEC 2025
June 16 - 19

TIP OpenLAN: Momentum in OpenWiFi (with 300k APs shipped globally), with propositions for the Hospitality & MDU sectors

Connected World KSA
November 18-19

Journey to 6G and Automation in RAN: Panel sessions with TIP, discussing relevant growth opportunities in the Saudi Arabian market

The Great Telco Debate
December 4

Open Network APIs: panel discussion including TIP on the challenges in scaling Open Network APIs

Events Powered by TIP

FYUZ®

November 3-5

FYUZ 2025, our flagship industry event, brought the global telecom ecosystem together in Dublin for three days of collaboration, focused on accelerating open, disaggregated, and AI-enabled networks. From executive-level discussions to hands-on demonstrations, a Hackathon and community-driven sessions, FYUZ 2025 reinforced TIP's role as a neutral platform for turning innovation into operational impact and advancing the future of open connectivity worldwide.

TIP OpenWiFi Global Summit at Wi-Fi World Congress USA

April 30

With over 400 attendees, this summit marked key OpenLAN milestones:
- Launch of community-developed Wi-Fi 7 Access Points with AFC support
- Over 220,000 OpenWiFi devices deployed (with a projection to exceed 300,000 in 2025)
- Expansion of OpenLAN Switching (OLS) portfolio with 15+ new switch SKUs
- Announcements around OpenLAN 2.0 governance and PKI 2.0 for security and zero-touch provisioning

AWS Breaking Barriers for Agentic Networks Hackathon, powered by TIP

October 31 - November 2

This hackathon in Dublin brought together developers, researchers, and telecom innovators to build AI-driven, agentic network solutions using AWS technologies in collaboration with the Telecom Infra Project. Hosted at Dogpatch Labs ahead of FYUZ, the hackathon focused on real-world applications of autonomous intelligence across RAN, core, transport, and next-generation network architectures.

FYUZ®

by TELECOM INFRA PROJECT®

TIP's flagship event returned to Dublin with record-setting momentum. FYUZ 2025 showcased TIP's Project Group achievements, product demos, and technical collaboration in action, bringing together operators, vendors, system integrators, and policymakers.

Check out the full 2025 Post-Event Report here.

1,000+
attendees

225
speakers

41
content sessions

38
sponsors & exhibitors

TELECOM TV

OFFICIAL MEDIA PARTNER OF FYUZ 2025

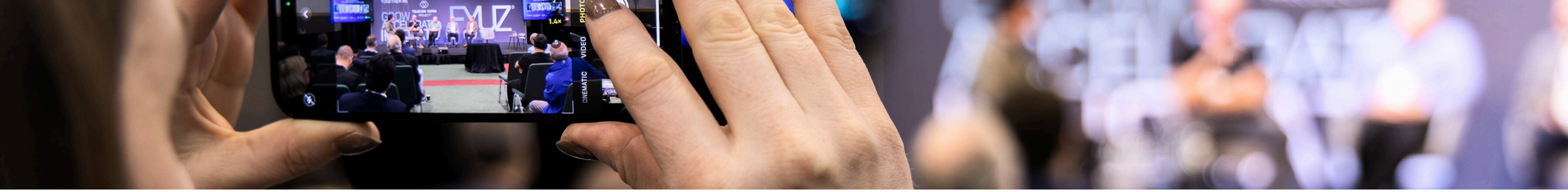
As TIP's Exclusive TV Partner, TelecomTV delivered in-depth interviews with leaders from AT&T, Deutsche Telekom, CloudExtel, Orex SAI, and more—showcasing real-world Open RAN deployments, AI-driven innovation, and emerging network strategies shaping the future of telecom.

Watch the Fyuz 2025 Executive Interview Series →







Press & Analyst Coverage

[Telcos unite to tackle video traffic strain with TIP initiative (Advanced Television)]

[Feature: Team TIP details RAN, LAN progress during FYUZ 2025 (Mobile World Live)]

[TIP brass highlight evolution, convergence focus (Mobile World Live)]

[Autonomous and Programmable Networks (RCRTech)]

[TIP tunes in to video opportunity (Mobile World Live)]

[Deutsche Telekom preps RFQ for 30k RAN sites (TelecomTV)]

[Good candid discussions with AT&T and TELUS (RCRTech)]

TELECOM TV

ADVANCED TELEVISION

TelcoTitans
The Authority on Telco.

telecompaper

RCR Tech
NEWS. INSIGHT. IMPACT.

LightReading

CCS Insight

THE FAST MODE

MOBILE WORLD LIVE

tcom

TECHNOLOGY ReTHINK RESEARCH

analysys mason

FYUZ 2025 Takeaways

On a path to scale

- Transport: AI & Apps development using SDN APIs, IPoDWDM using coherent pluggables
- Enterprise-grade OpenWiFi & LAN switching
- Inbuilding coverage using neutral host

Build a vibrant, diverse market ecosystem

- SMO-RIC market with portable and carrier-grade rApps

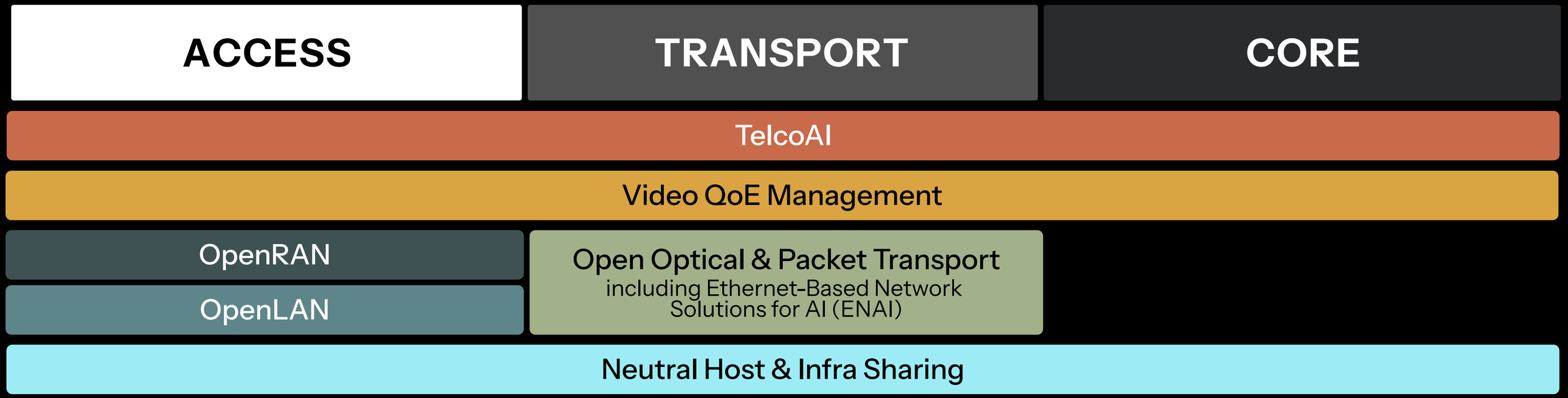
Prove, learn, and scale

- End-to-end QoE video optimization on mobile networks
- Inter AI-data center Ethernet transport
- Monetable services through Open Network APIs or Compute
- NTN + Terrestrial integrated connectivity services

Trial and frame for industry

- Foster use case-specific agentic and AI apps ecosystem, through exposure of domain-specific, sovereign telco network data, federated learning, and agentic platforms

TIP Project Group Landscape: 2026 and beyond



OpenRAN

New Project Group Leadership

Melissa Ness
AT&T

Devang Solanky
Vodafone Group

Holger Erkins
Deutsche Telekom AG

Sushil Rawat
TELUS

Ravinder Jarral
Boost Mobile

Governance

The Project Group is led by multi-operator Co-Chairs who set the technical strategy, approve the workplan, oversee subgroup effectiveness, and supervise the nomination of new subgroup co-leads and workstreams, in line with the Project Group Charter.

Subgroup Co-Leads define the technical direction and drive use cases, requirements, and test plan development across the community.

Structure

A consolidation to two active subgroups, each led by cross-industry Co-Leads from operators and vendors

Community Engagement

Broad participation from global operators and vendors

High engagement driving use cases and solutions

Subgroup Co-Leads

Solutions

1FINITY · AT&T · NIST · TEJAS NETWORKS · VIAVI Solutions · vodafone

RAN Intelligence & Automation (RIA)

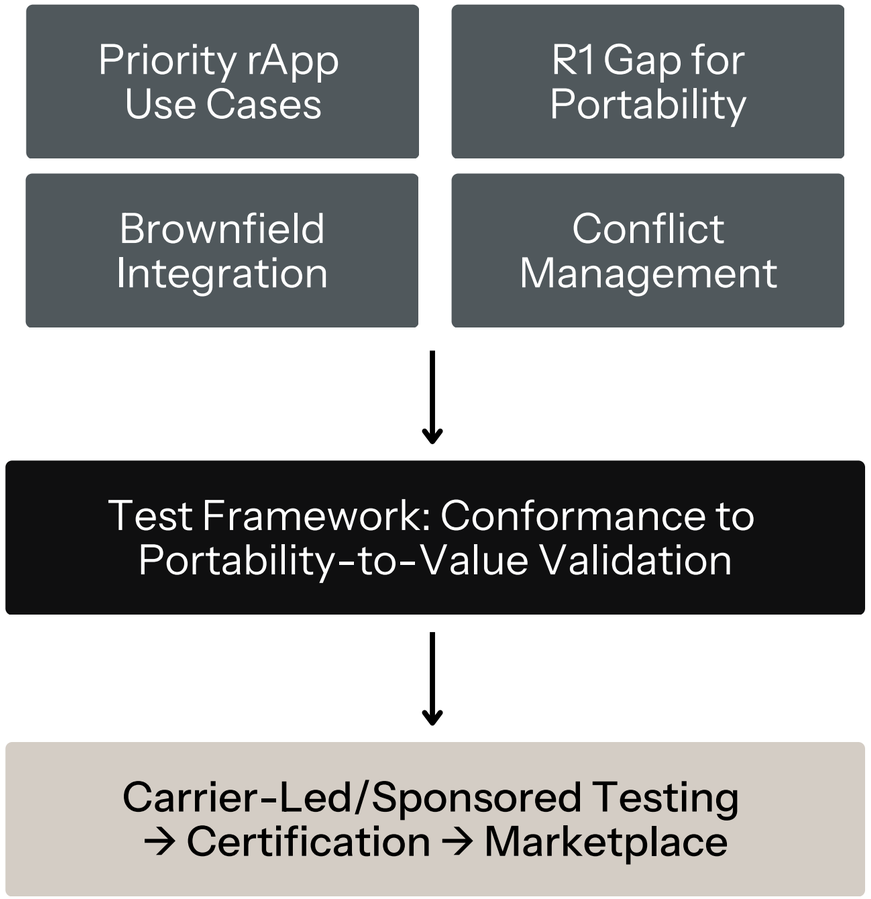
AIRA TECHNOLOGIES · AT&T · ECHOSTAR · ERICSSON · HCLTech · Meta · TELUS · VIAVI Solutions · vodafone

OpenRAN

Advancing Intelligence, Orchestration, and Automation

SMO-RIC Framework

A trusted adoption path for brownfield and OpenRAN operators to deploy multi-vendor SMO, RIC, and rApp solutions, **enabling true rApp portability** across different SMO-RICs.



Regional TIP Community Projects

ARIANE I

One of TIP's most ambitious technical initiatives, the **Accelerating RAN Intelligence Across Network Ecosystems (ARIANE)** program, successfully wrapped up in March 2025.

This UK DSIT match-funded effort brought together a powerful consortium to test and evaluate multiple rAPPs/xAPPs across a range of RIC platforms.

The work generated critical insights into:

- Application conflict management and onboarding
- O-RAN interface compliance and performance
- Security posturing within Open RAN architectures
- Common API requirements for cross-platform portability

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ARQIT · BT · HCLTech · REPLY NET · VIAVI Solutions · vmware by Broadcom

Department for Science, Innovation & Technology

ARIANE II

In April 2025 and running through December 2025, ARIANE II was led by TIP and included a refreshed consortium.

This program leveraged the SONIC testbed in the UK to:

- Develop and test energy management rAPPs on a Capgemini non-real-time RIC
- Run simulated and indoor OTA testing
- Evaluate security posturing using Generative AI tools across the architecture

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ARQIT · BT · CATAPULT Digital · HCLTech · REPLY NET · VIAVI Solutions

USTDA U.S. TRADE AND DEVELOPMENT AGENCY

KOMDIGI Kementerian Komunikasi dan Digital Republik Indonesia

USTDA OpenRAN Feasibility Study for Rural Indonesia

Started in 2024, a USTDA-funded, socio-economic and technical assessment of 4G Macro OpenRAN deployment on shared infrastructure across underserved Rural Indonesia.

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KCCTech Innovative Solutions · Telkom University · IBM · CERAGON · Parallel Wireless · EDOTCO

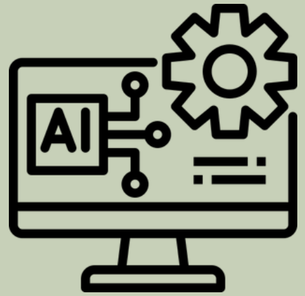
Open Optical & Packet Transport

Accelerating IPoDWDM & ENAI Initiative

Accelerating IPoDWDM deployments and pluggable IOT

New initiative and subgroup (ENAI) focused on Ethernet-based networking, driven by AI traffic between data centers

- Co-led by KDDI and AT&T
- Define an Ethernet-based, lossless, and scalable reference architecture for inter-AI data center traffic.



AI, SDN APIs, and Applications
Major focus on AI and MUST SDN APIs, as well as applications for transport (linked with Data & AI Foundations Project Group)

Technical Contributions

Gold Badge

NEC

In 2025, the TIP community delivered and recognized impactful innovations across our **OpenRAN** and **Open Optical & Packet Transport (OOPT)** Project Groups. Congratulations to these organizations on their badged solutions!

Silver Badge

amdocs HCLTech NEC REPLY NET

Bronze Badge

Adtran 國立臺灣科技大學 NATIONAL TAIWAN UNIVERSITY OF SCIENCE AND TECHNOLOGY nycu NATIONAL YANG MING CHIAO TUNG UNIVERSITY PEGATRON

OpenLAN

Enterprise-Grade OpenLAN

Open stack and community developed

Commercially ready propositions, including multi-dwelling unit solutions and mobile offload solutions

Currently ~400K OpenWiFi access points, 80+ SKUs, and 300+ community developers

Multi-Vendor Cloud: Vibrant Ecosystem
Diverse supply chain, common tech stack
Developed by community and maintained rigorously

Multi-Vendor OLG: Disaggregated & Complete Offer
Choice in hardware, software, and controller
Remove vendor lock-in, open APIs

Multi-Vendor OLS: Fully Open Source
Enable innovation and new entrants
Open infrastructure for third parties

Multi-Vendor OpenWiFi | Goal: Reduce TCO
Disaggregated model OPEX and CAPEX reduction

Neutral Host & Infra Sharing

Established Neutral Host as a prominent subject within TIP

Built a cross-ecosystem community of Neutral Host operators and infrastructure providers, venue owners, and enterprise

Published the first NHIS Framework (see below), detailing:

- What constitutes Neutral Host infrastructure
- Key dimensions such as ownership, sharing models, access, scalability, and neutrality

Shifting the industry conversation from passive to active sharing

- Advanced industry understanding beyond basic passive sharing (towers, space)
- A shift to active sharing (MORAN, MOCN, DAS, small cells)
- Highlighted the role of fiber, cloud, and software in Neutral Host deployments
- Published a set of case studies from UK, Europe, USA and India

Our Work

Neutral Host & Infra Sharing Framework

Neutral Host & Infra Sharing 2025 Leadership Roundtable

Meta Case Study Review with Shirish Nagaraj and Anwar Saddique

TelcoAI

This community focused on use cases and reference implementations for AI infrastructure, including B2B and B2C AI use cases at the edge, regional, and centralized data centers in operator infrastructure, as well as the use of public cloud options where applicable.

The Project Group released its first whitepaper. This pivotal whitepaper uncovers how AI is revolutionizing the telecom industry, providing actionable insights and real world examples that reveal where operators can generate the greatest value and competitive advantage.

Project Group Leadership

Andreas Gladisch
Deutsche Telekom

Elad Blatt
NVIDIA

Slawek Stawiarski
Intel

Thierry Nagellen
Orange

Video QoE Management

Founding Members

AT&T Meta orange Telefónica vodafone YouTube

Challenge

80% of wireless traffic is video from major video apps. Traffic optimization is getting more difficult due to end-to-end encryption.

Goals

Defining common QoE metrics for video traffic

Specifying information exchange about network status and subscription policies between CSPs and CAPs for better video traffic optimization

Looking Ahead to 2026

Expanding Global Participation

- Continue Sponsor Participation expansion
- Deepen engagement in MEA, APAC and LATAM
- Retain and grow member base from existing base of 125 organizations/900 members

Progressing Autonomous & Programmable Networks

- Enable multi-vendor SMO-RIC across RAN systems & portable, certified rAPPs
- Specify & prove Ethernet based transport for AI workloads
- Encourage further solution innovation in AI for Networks & Networks for AI

Scaling Commercially-Ready Solutions

- Increase uptake of optical pluggables and SDN architectures for Optical & IP Transport
- Accelerate uptake of Enterprise grade OpenWiFi & OpenLAN switching solutions
- Drive awareness and adoption of replicable Neutral Host approaches
- Test, Badge and Promote replicable E2E solutions with OpenRAN components

Stay tuned for exciting updates, new leadership initiatives, and upcoming events, where we will continue building the future of open and disaggregated networks!

FYUZ®

by TELECOM INFRA PROJECT®

November 3-5, 2026
The Westin Seattle

Join us in Seattle for 3 days of networking, innovation, and industry advancement.

Visit **fyuz.org** to sign up for updates, inquire about speaking and promotional opportunities, and more!

From our team to yours, thank you for a great 2025!

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