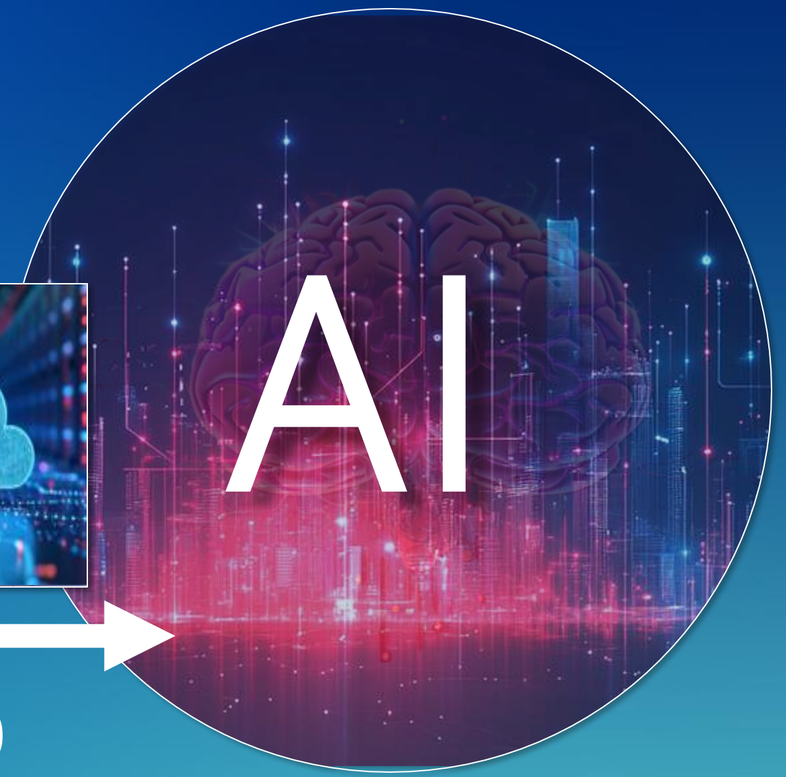
Painel Telebrasil – 2025

Rafael Mezzasalma
Country Manager – Nokia Brazil

Transformative social inflection points



1990s 2000s 2007 2010 2020

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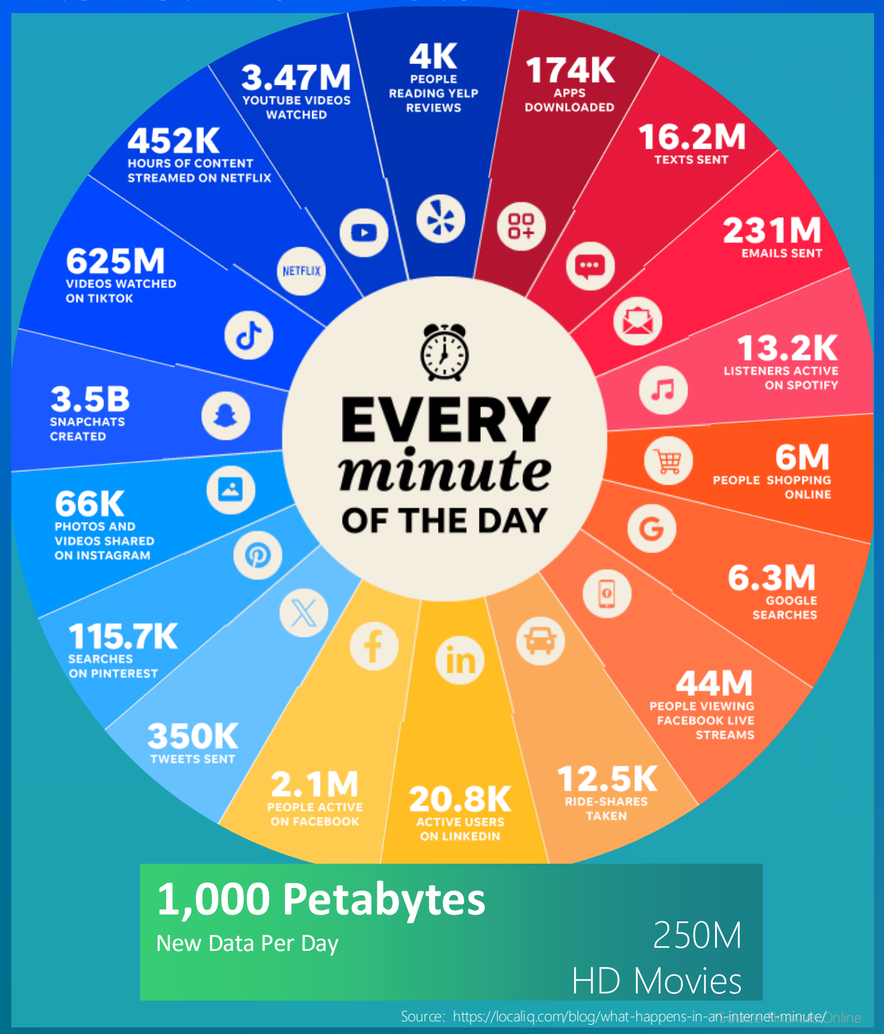
Telecom Today

Mobile Connections:
around 9 billon subscriptions in 7 million sites

Internet in a minute



Source: https://localiq.com/blog/what-happens-in-an-internet-minute/Online

Fiber deployments

In 50 years of deploying fiber, we have deployed enough fiber to completely encircle the earth

~200,000 Times

Source: Corning Evolution of Fiber Infographic

Cloud computing

>11,000 DATACENTERS WORLDWIDE

>1,000 HYPERSCALE DATACENTERS

>$700B 2025 CLOUD SPENDING (21% YoY Growth)

*Statista, Synergy Research Group, Gartner Research, Flexera, G2: Cloud Computing Stats

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AI is the primary engine of innovation over the next decade, potentialized by the integration of emerging technologies

Artificial Intelligence

Augmenting human capabilities

Quantum Compute

Incomparable computing capacity

Devices

Smartphones evolving to natural language and multimodality to be more ‘human”

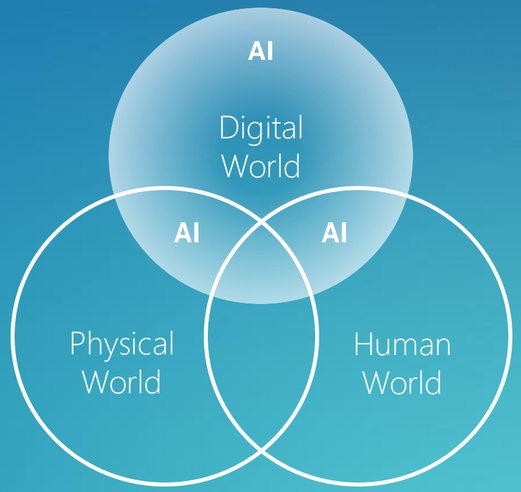
Security

Need for cyber security and privacy increases exponentially

Merge of worlds

Nokia Bell Labs envision that by By 2030+, technology expanding human possibilities:

- Connection of human, physical, and digital worlds
- Digital convergence boosts digital world’s potential
- Transformation across society and business



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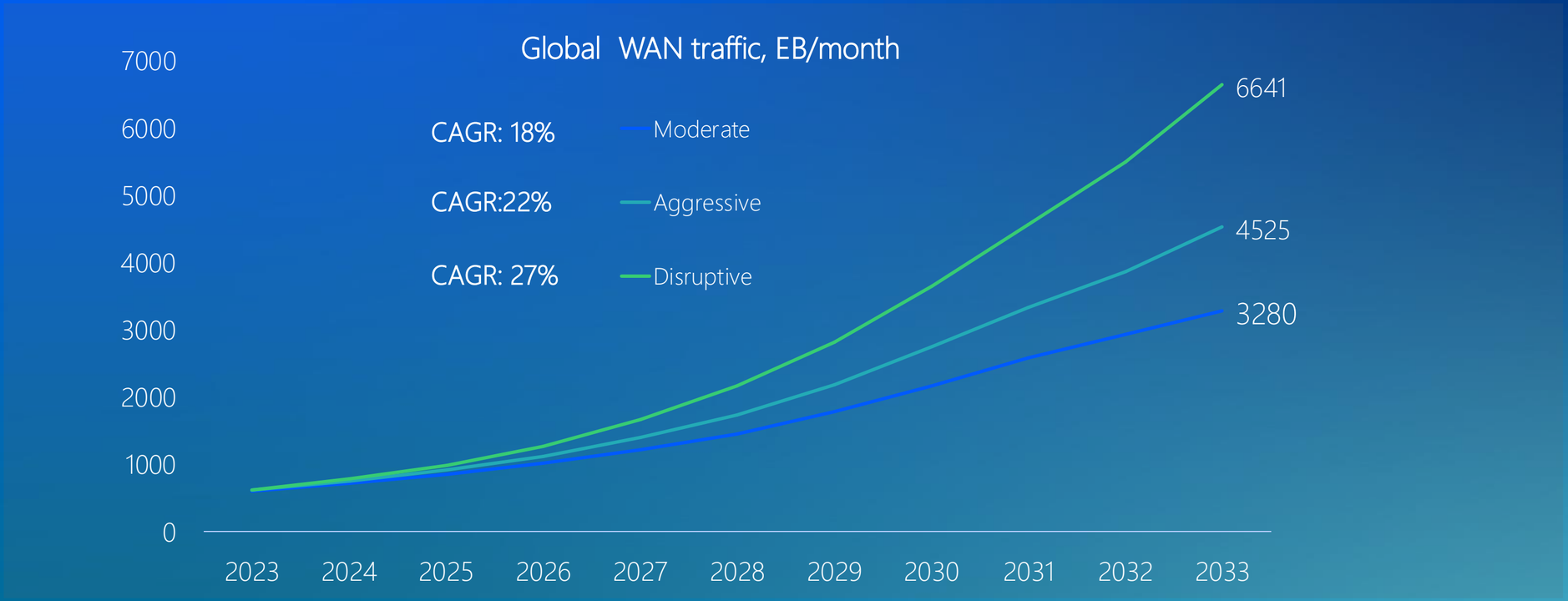
The combination of new services, device expansion and surge in AI usage are fueling unpreceded data traffic growth



Global traffic
will grow at a CAGR of 18% to 27%

Global consumer traffic
CAGR of 18%-25%

Enterprise WAN traffic
CAGR of 23%-36%

Aggressive Model

Increase in Enterprise , AI and consumer cloud traffic .

Disruptive Model

Further Increase on Enterprise Industrial and Consumer XR traffic

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The AI Wave impact in data centers

Global DC Power Usage

2023

55GW

Global DC Bandwidth Requirements

2023

771
EB/Month

Source: McKinsey Oct 2024

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The AI Wave impact in data centers

Global DC Power Usage

Global DC Bandwidth Requirements

Source: McKinsey Oct 2024

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We need to keep up, for the world to go forward
Our solutions are designed and ready to cope with the new demands

AI-driven autonomy

Built-in AI

- Proactive insight
- Intent-based control
- Path to L4+ autonomy

Automation at scale

A unified model

- Driving full lifecycle automation
- Simplifying operations in all domains (RAN, IP, Fixed, Optics, Core, Transport)

Secure by design

Telecom-specialized defenses and real-time assurance

- Resilience
- Compliance
- Future ready

Data Centers

EB (Exabyte) Era

- Datacenter for IA training
- Datacenter for inference
- Edge Computing

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We need to keep up, for the world to go forward
Our solutions are designed and ready to cope with the new demands

Networks as platforms for monetization to enhance and drive our customer's competitive differentiation

- Network as a Code-Open APIs
- Converge Charging
- Network slicing
- Private Networks
- Autonomous Network Fabric

ESG Continuously improving product energy efficiency, driving circularity to reduce waste, sustainable operations and supply chain, providing critical networks for life

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An unrivalled track record of driving innovation that changes the way we live, work and communicate

Transistors

Information Theory

Solar cells

Laser/fiber optics

Satellite communications

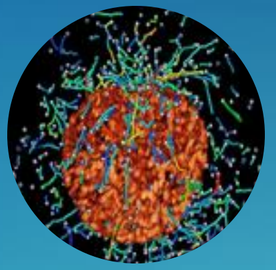
Charge-coupled devices

Unix/C/C++

Coherent optics

Cellular communications

Neural networks



Super-resolution microscopy

Multi-antenna systems

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Worldwide recognition for revolutionary discoveries

10

Nobel Prizes

5

Turing Awards

5

Draper Prizes

14

US National Medals of Science

12

US National Medals of Technology & Innovation

3

Japan Prizes

3

Technology Emmy® Awards

2

Grammy Awards

1

Oscar

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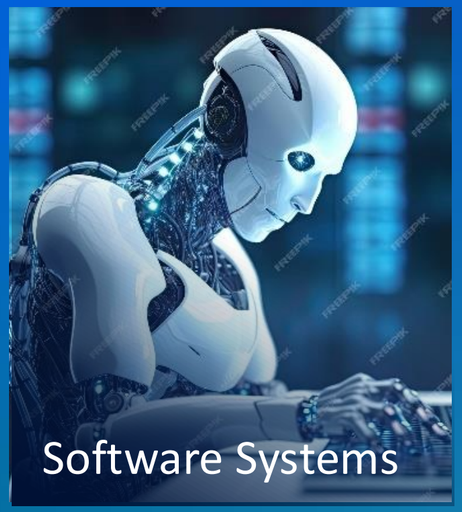
Nokia Bell Labs

The past guiding the future



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TIME and Statista’s World’s Most Sustainable Companies List

We’re truly honored to be named one of the World’s Most Sustainable Companies in 2025, ranking #37.

This recognition is a testament to our strategic commitment to sustainability, fully aligned with our corporate strategy to develop ESG into a competitive advantage.

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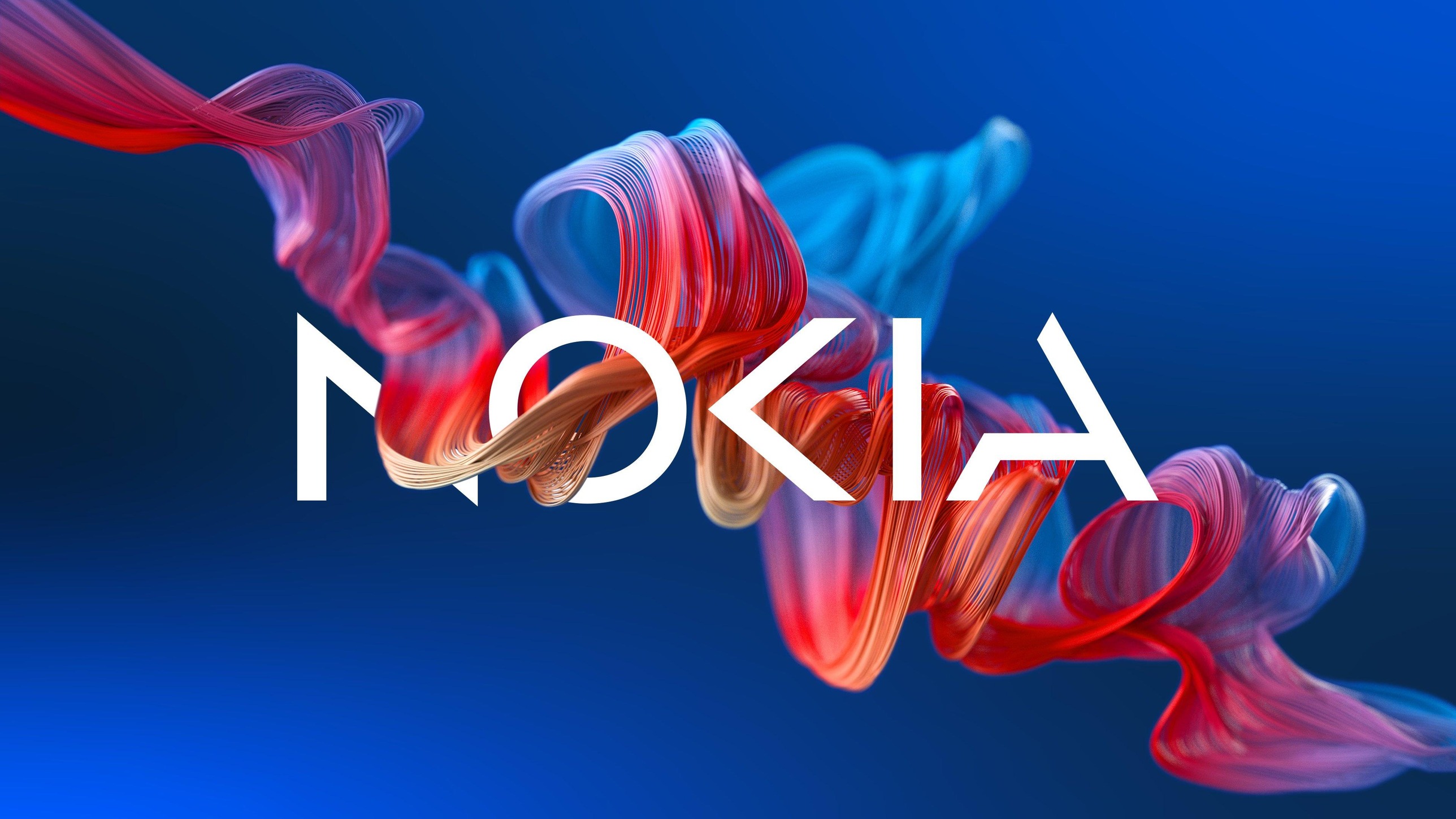
We create technology that helps the world act together

At Nokia, our mission goes beyond technology: we create value for customers, partners, and end users.

Scalable, secure, and sustainable networks. Innovative business solutions and new ways to monetize networks. Smarter digital experiences.

Together, we are shaping the future of connectivity and telecommunications in Brazil.


NOKIA