

09:45–10:05 | NaaS State of the Industry



PASCAL MENEZES

Co-founder & Chief Technology Officer



Agenda

1

AI Market and Agentic AI

2

NaaS Connectivity for AI

3

NaaS Automation for AI

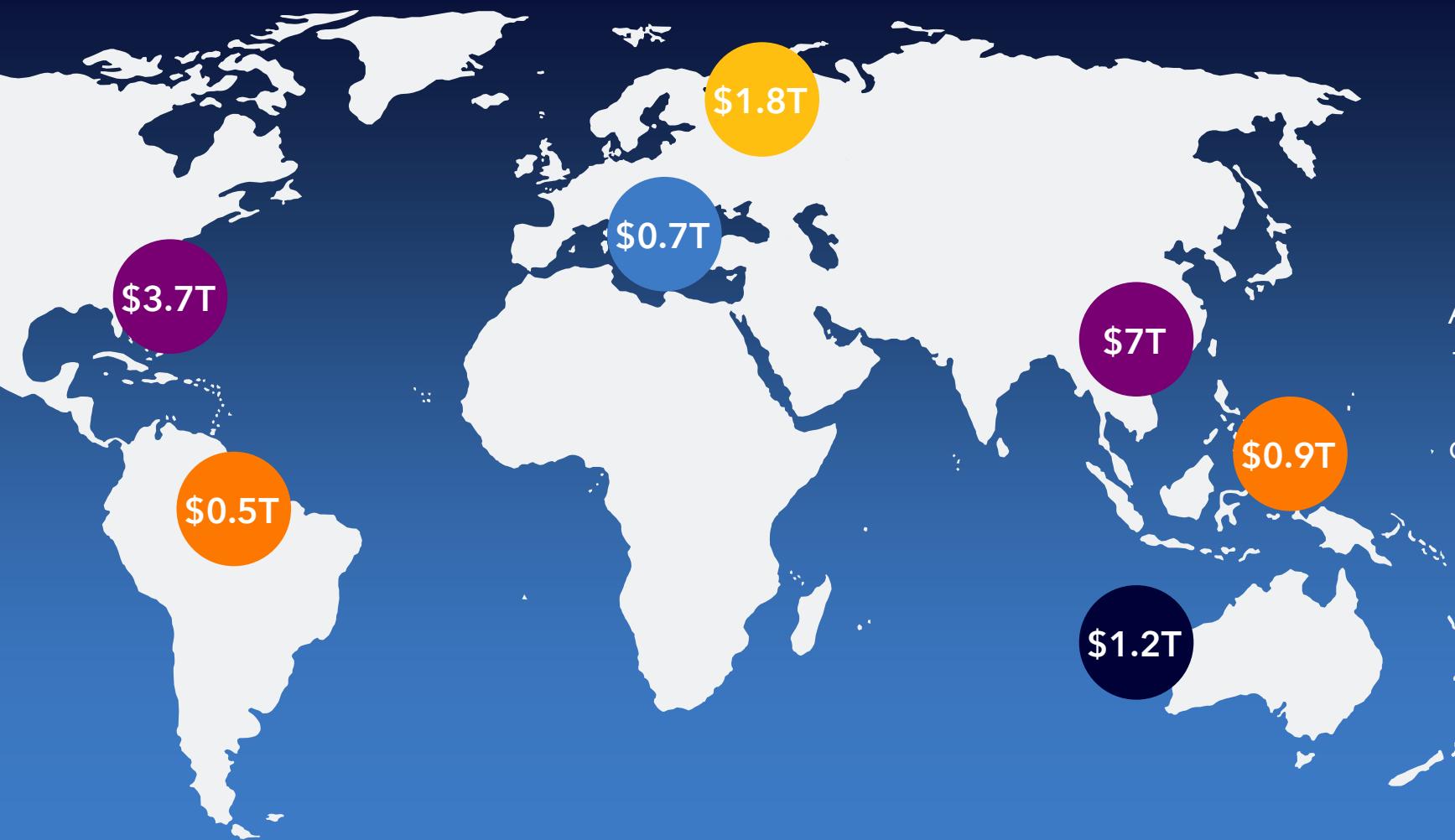
4

NaaS Cybersecurity for AI

5

Sovereign AI

AI – Market Size and GDP

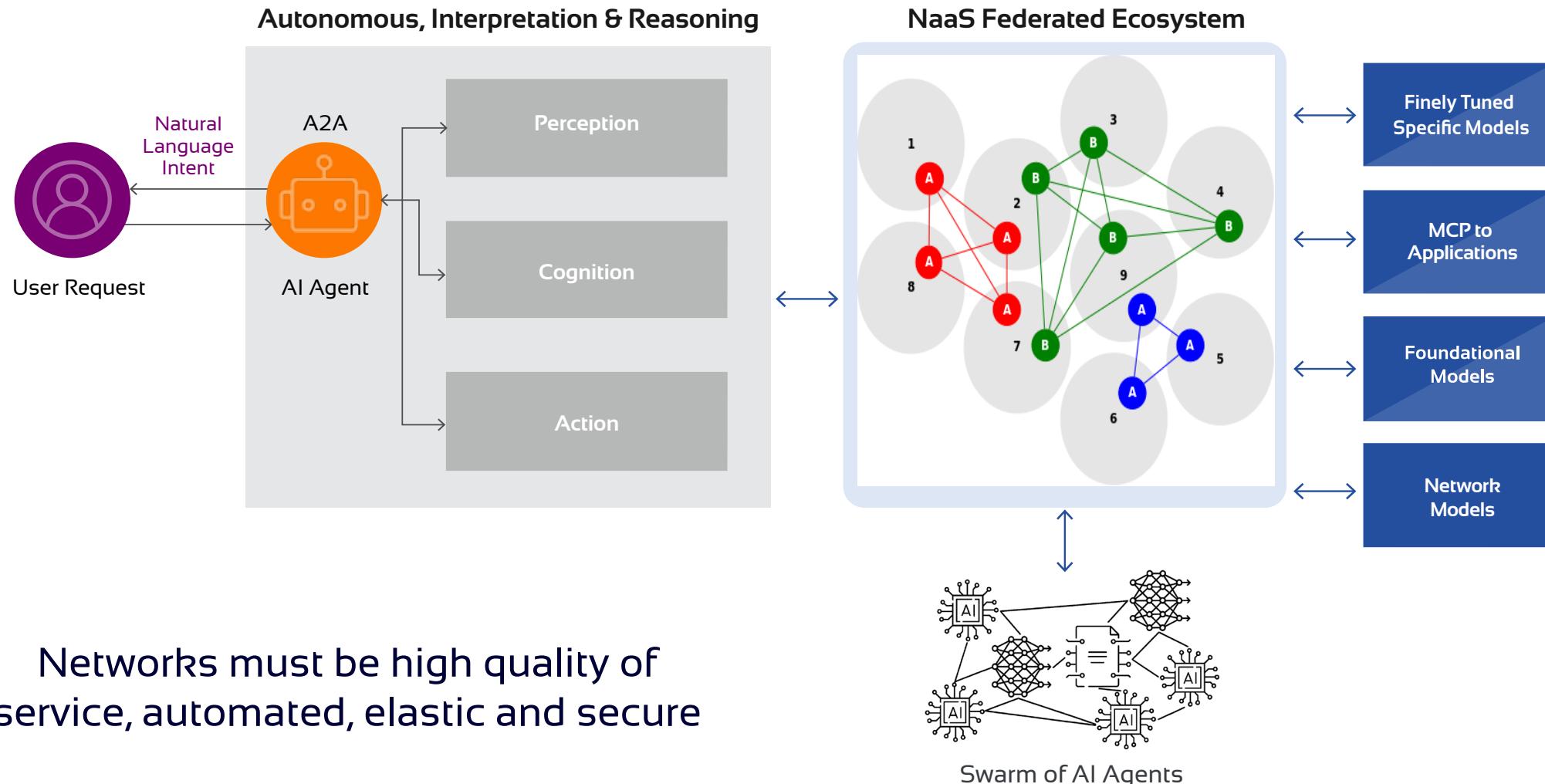


\$15.7 trillion
Game changer

AI could contribute up to \$15.7 trillion to the global economy in 2030, more than the current output of China and India combined. Of this, \$6.6 trillion is likely to come from increased productivity and \$9.1 trillion is likely to come from consumption- side effects.

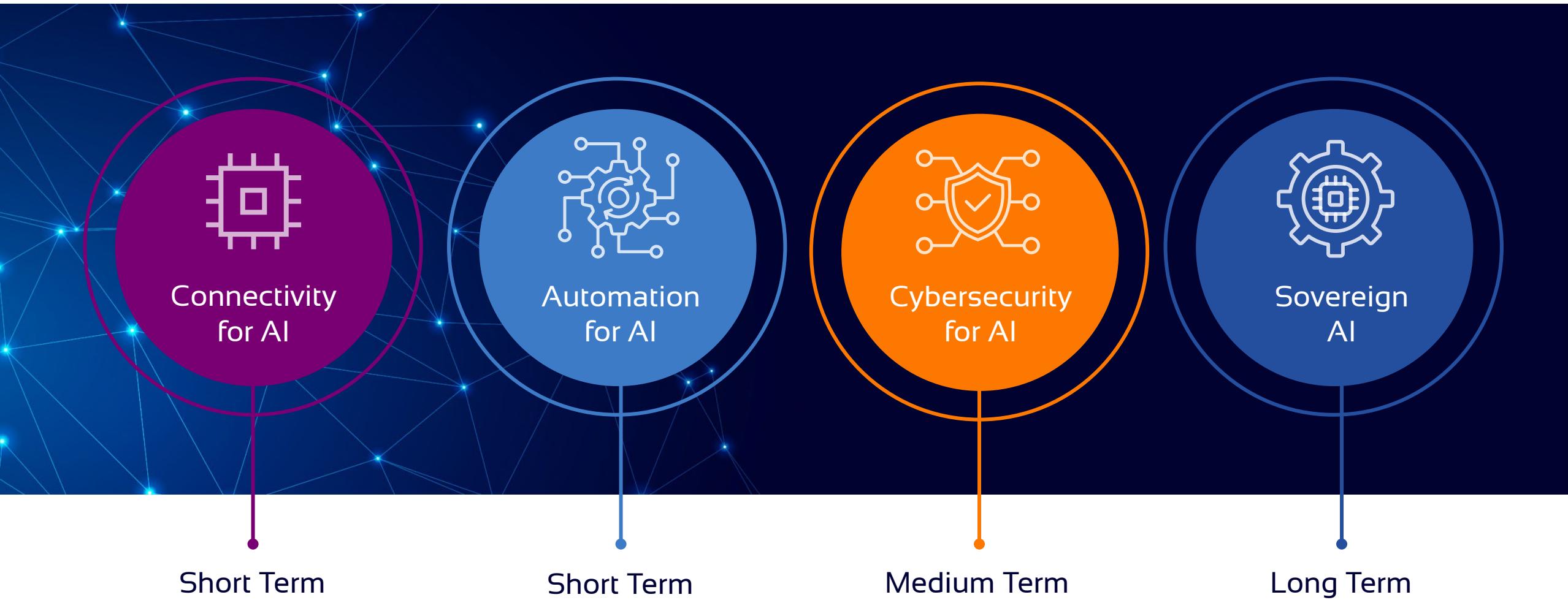
Source: PwC analysis

The Agentic AI Era – NaaS is the Infrastructure for AI



Mplify Assets Reused for NaaS for AI

Mplify NaaS Work Areas for AI



NaaS Connectivity for AI (Short Term)

Connectivity is the Toll Bridge for the AI Revolution

Inference demand is exploding,
up a billionfold with agentic AI

NVIDIA

\$6.7T in data center investment
by 2030 (**\$5.2T AI-ready**)

McKinsey

AI network traffic +10x by 2030

Omdia

Connectivity is now the
constraint...and opportunity

AI-infrastructure opportunity for
telecom providers could exceed
\$200-300B by 2030

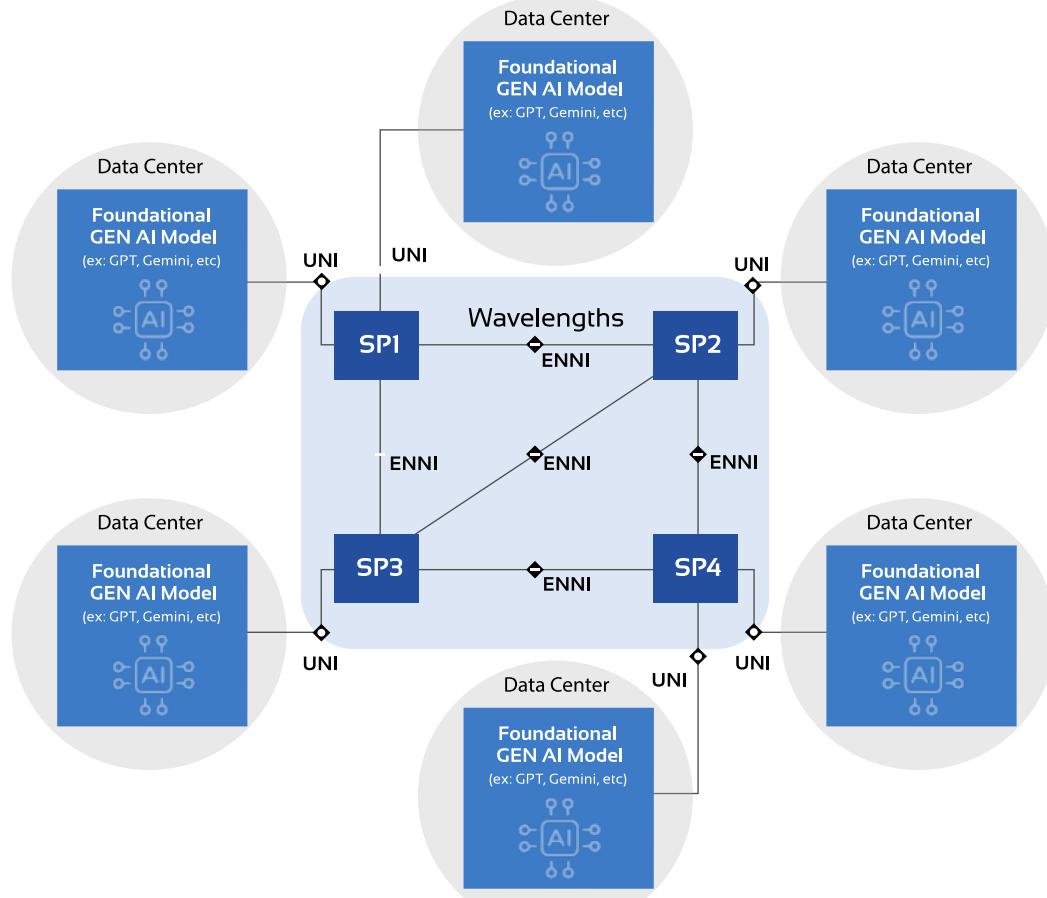
VARIED SOURCES



NaaS Connectivity for AI Training – Wavelengths & CE

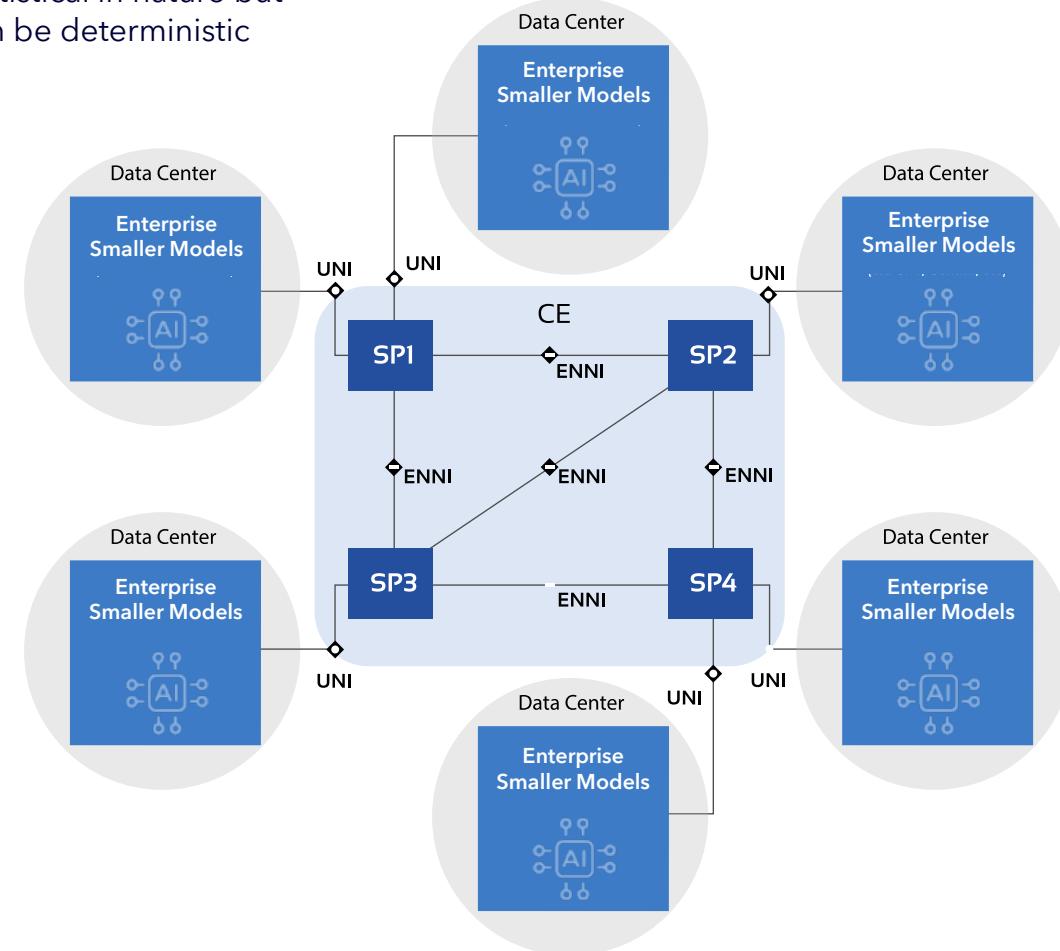
100Gbps, 400Gbps,
800Gbps and 1.6Tbps
Deterministic

Wavelengths



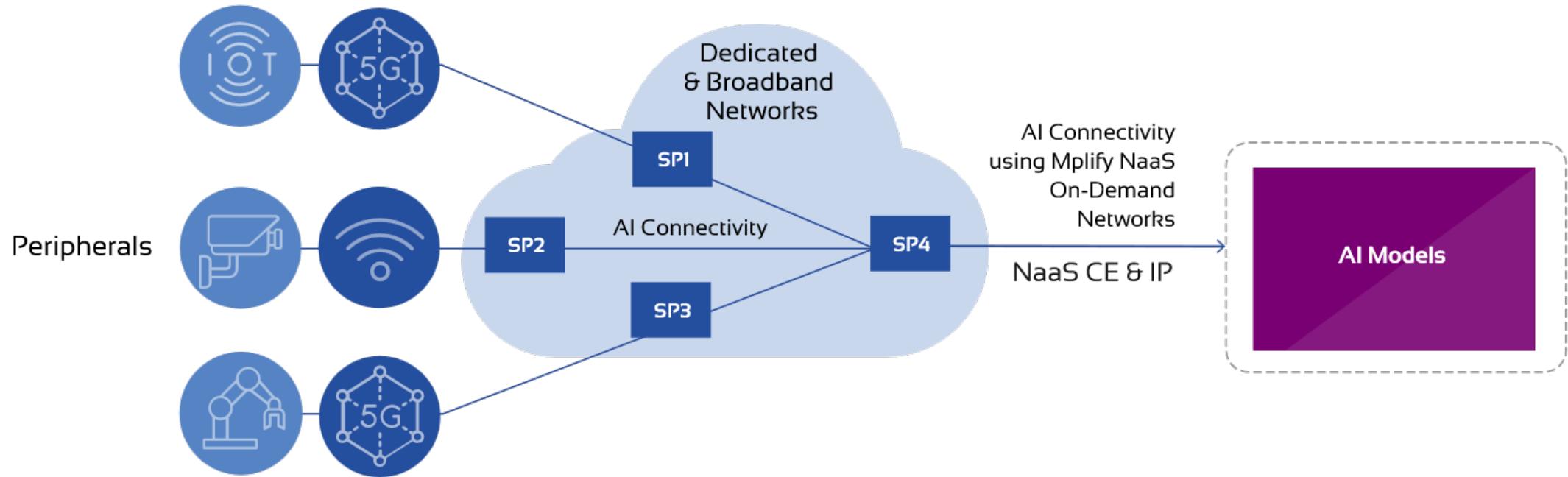
10Gbps, 100Gbps &
400Gbps
Statistical in nature but
can be deterministic

Carrier Ethernet



NaaS Connectivity for AI Inference

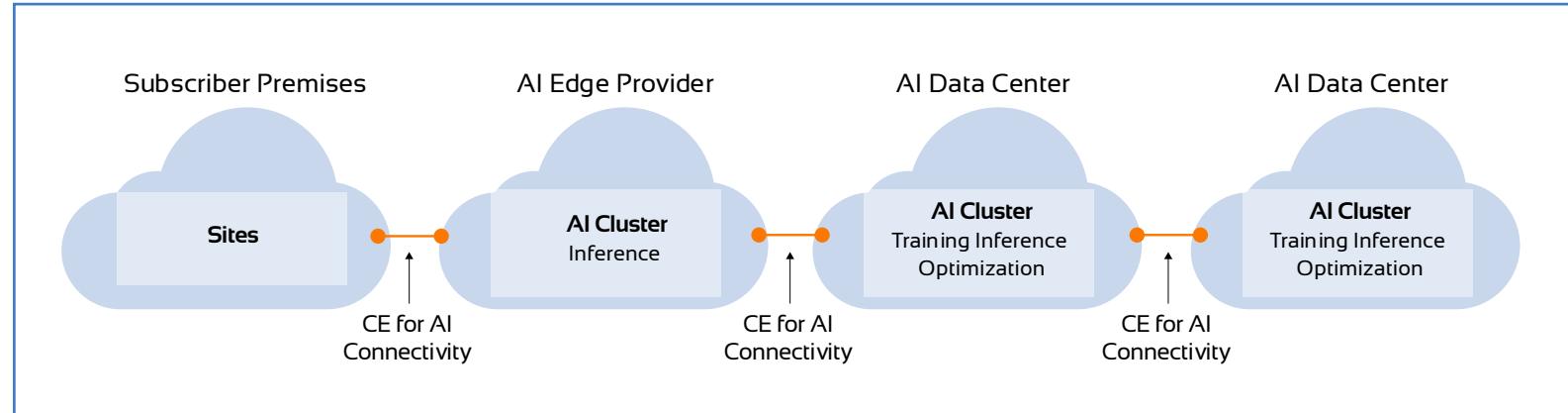
AI Connectivity over Dedicated or Broadband Networks



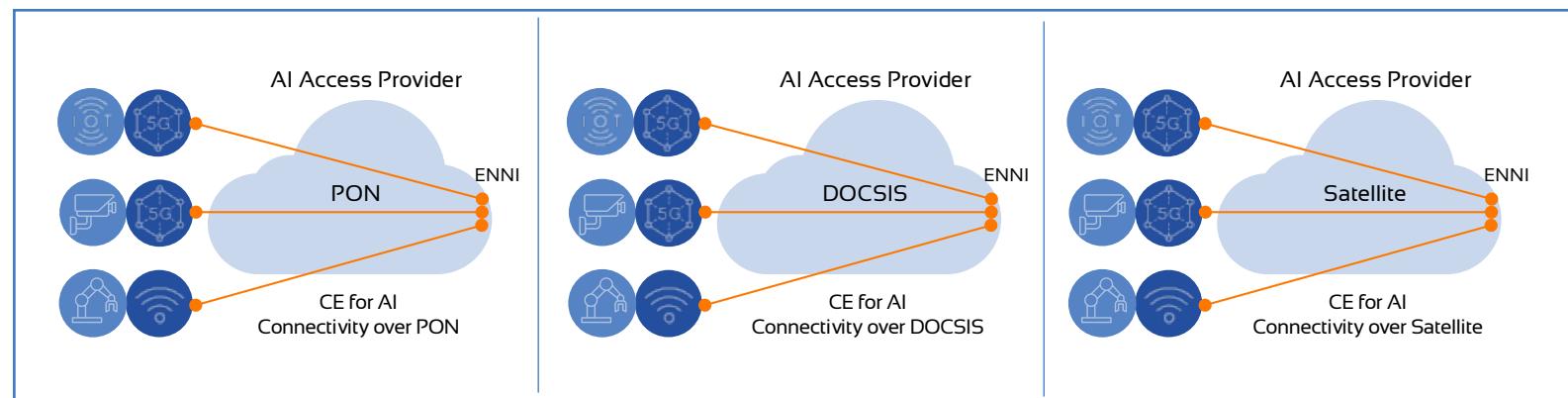
Carrier Ethernet Certification for AI

Carrier Ethernet Services	Business Profile (MEF 3.0)	AI Profile
E-Line	✓	✓
Access E-Line	✓	✓
Transit E-Line	✓	✓
E-LAN	✓	
E-Tree	✓	
Access E-Line over Broadband	✓	✓

✓ : Existing MEF 3.0 > New Business Profile certifications
✓ : Planned AI Profile certifications
✓ : Future Business and AI Profile certifications



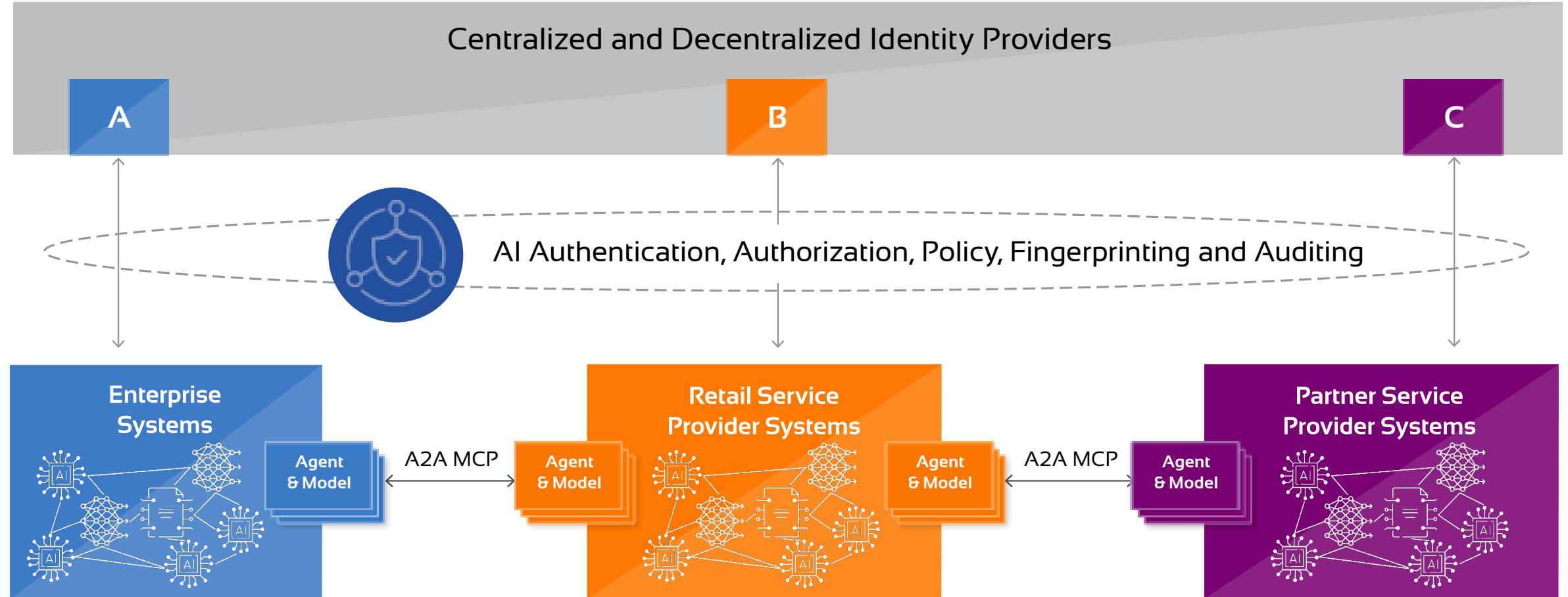
E-Line, Access E-Line and Transit E-Line for AI Services



Broadband Access E-Line for AI Services

NaaS Automation for AI (Short Term)

Automation for AI – A Federated Ecosystem with Trust

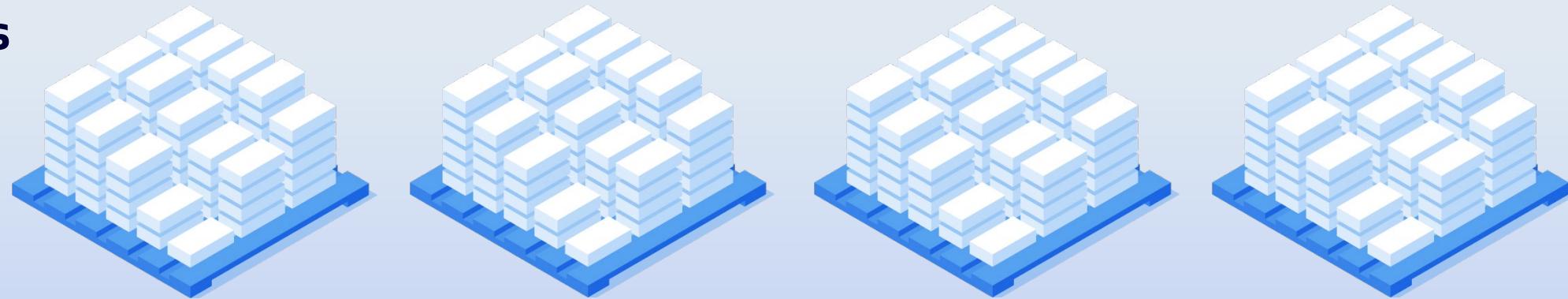


Mplify Federation Built for an AI Era

Mplify has implemented an initial standardized decentralized identity solution for a federation.

Automation for AI – Data Schemas are Important (Payloads)

**Data Schemas
(Payloads)**



Transports



MCP for AI



LSO APIs for IT Systems

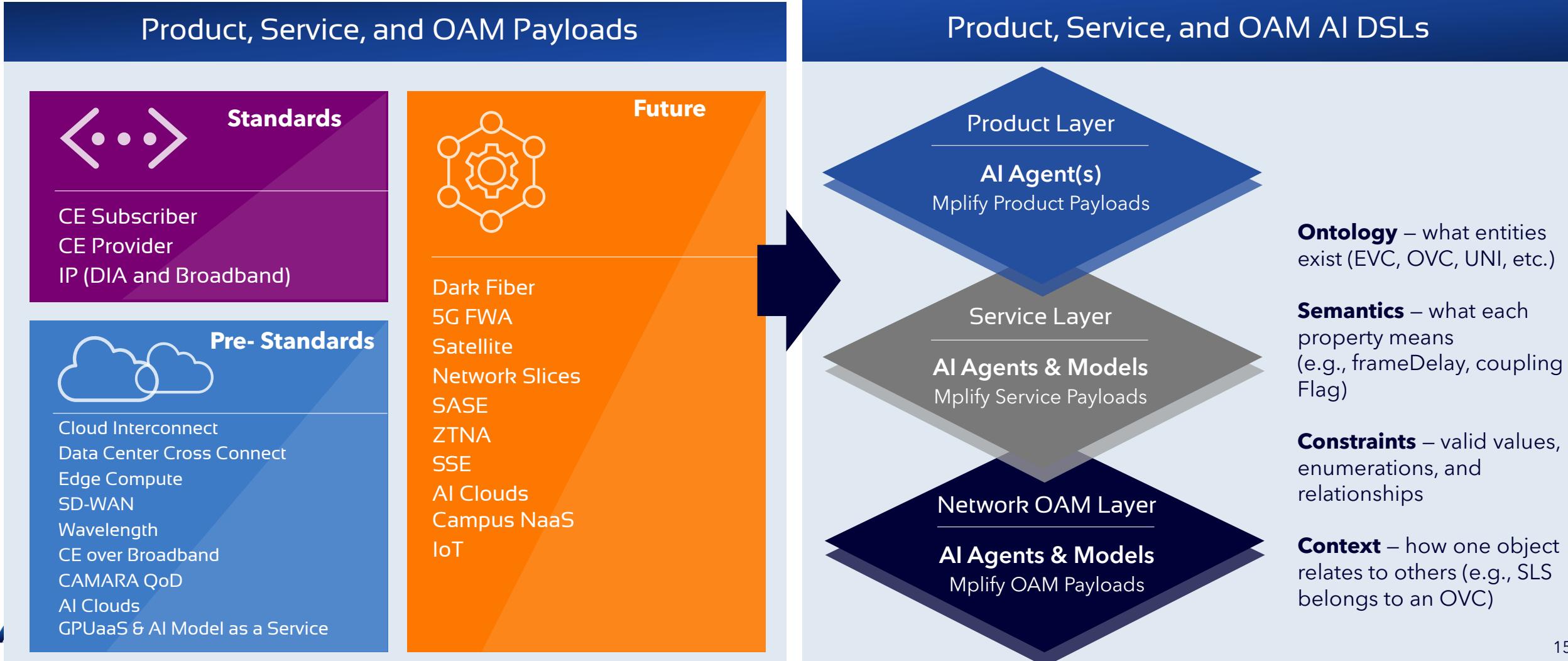
Automation for AI : Full Lifecycle Mplify LSO APIs for MCP



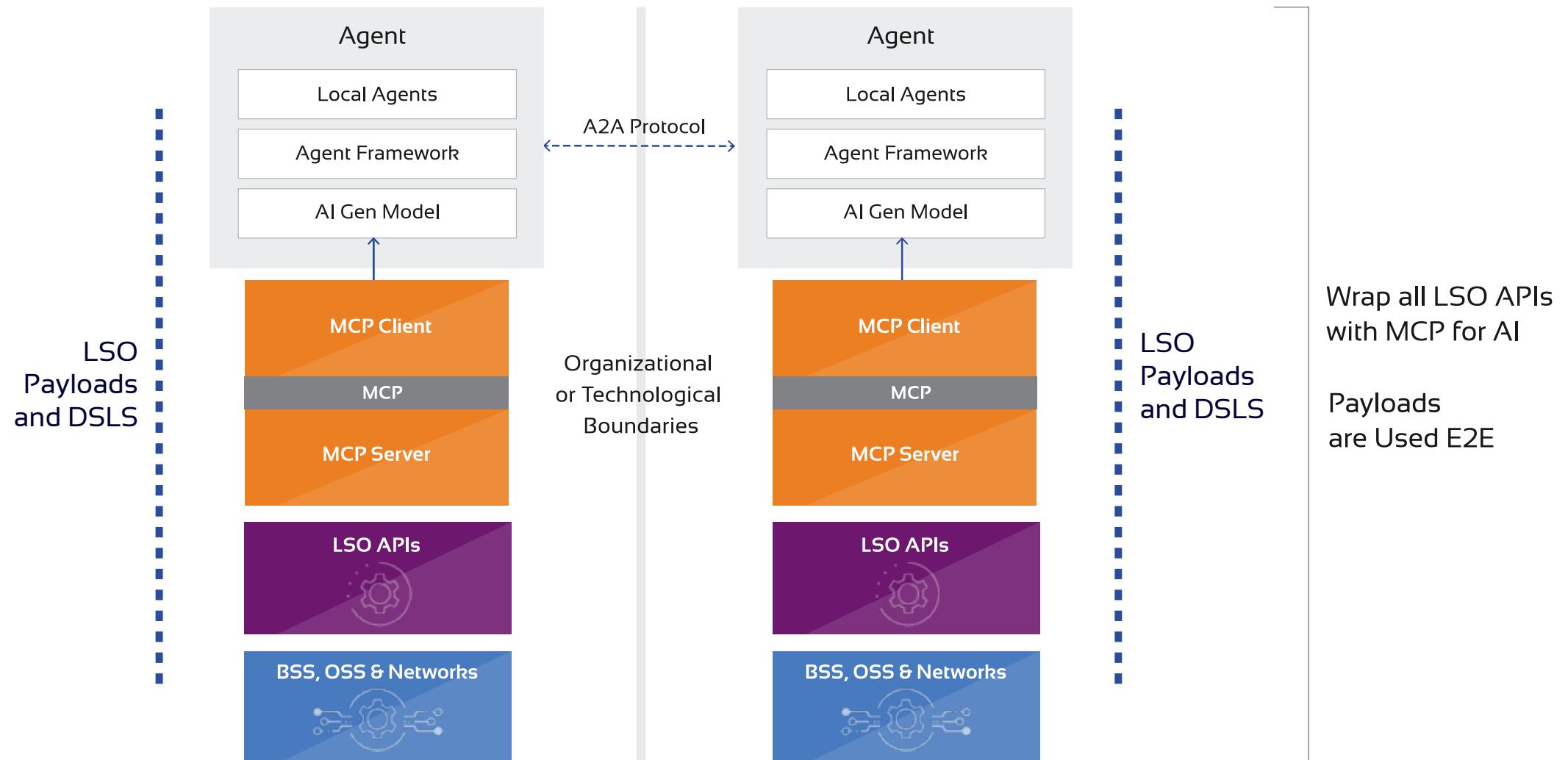
~100 SPs are in production or committed to production with LSO APIs. Growing enterprise adoption

Mplify Payloads as a Domain Specific Language (DSL) for AI

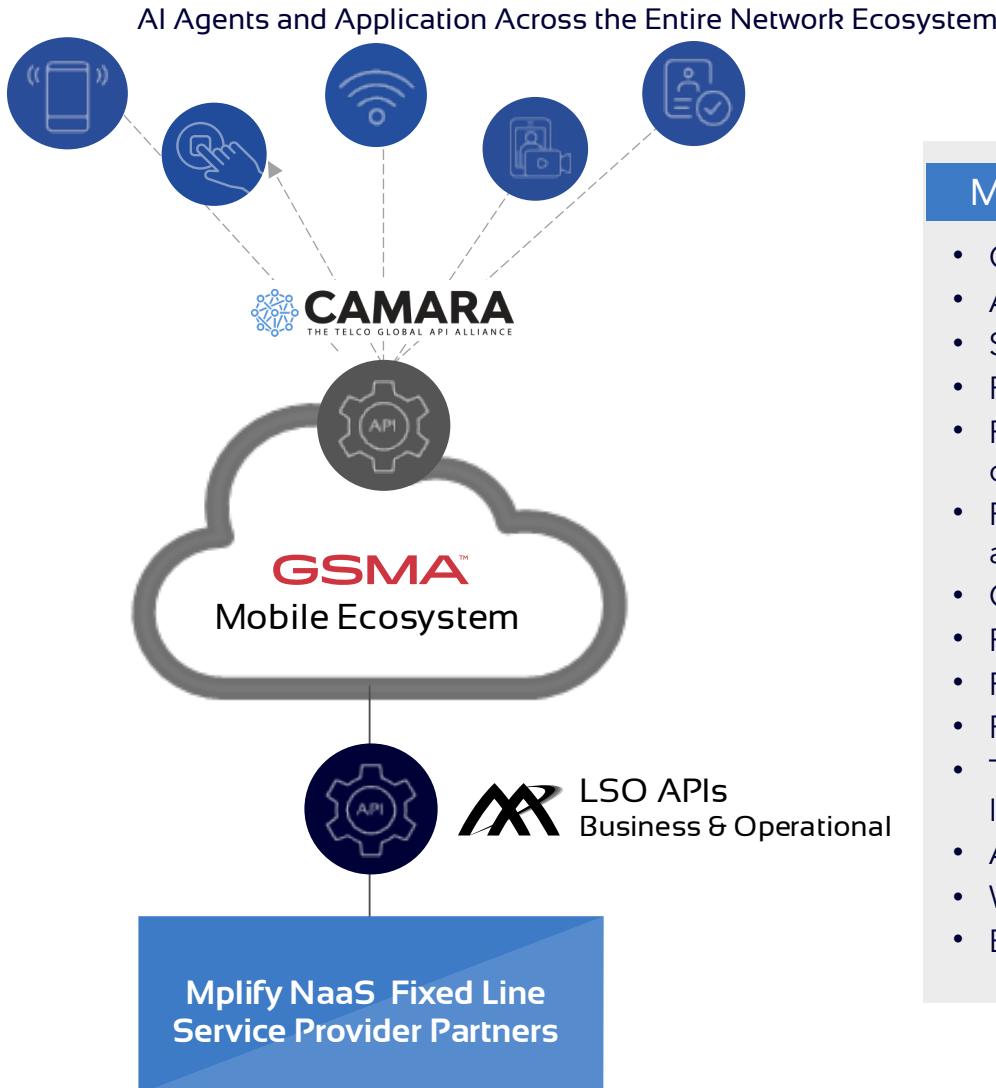
Use Mplify payloads to create domain specific language for agents and models



Automation for AI – A2A and MCP – Autonomous Adaptive Automation



GSMA and Mplify Collaboration for Wired and Wireless NaaS for the AI Era



Mplify Business APIs

- Onboarding API
- Address validation
- Site query
- Product catalog
- Product offering qualification (POQ)
- Product offering availability discovery
- Quote
- Price discovery
- Product order
- Product inventory
- Trouble ticketing & Incidents
- Appointment
- Work order
- Billing & settlement

Mplify Operational APIs

- Service provisioning & control
- Service function testing
- Service inventory
- Service performance monitoring – Performance monitoring and passive statistics
- Service performance monitoring – Threshold crossing alerts
- Streaming management
- Fault management

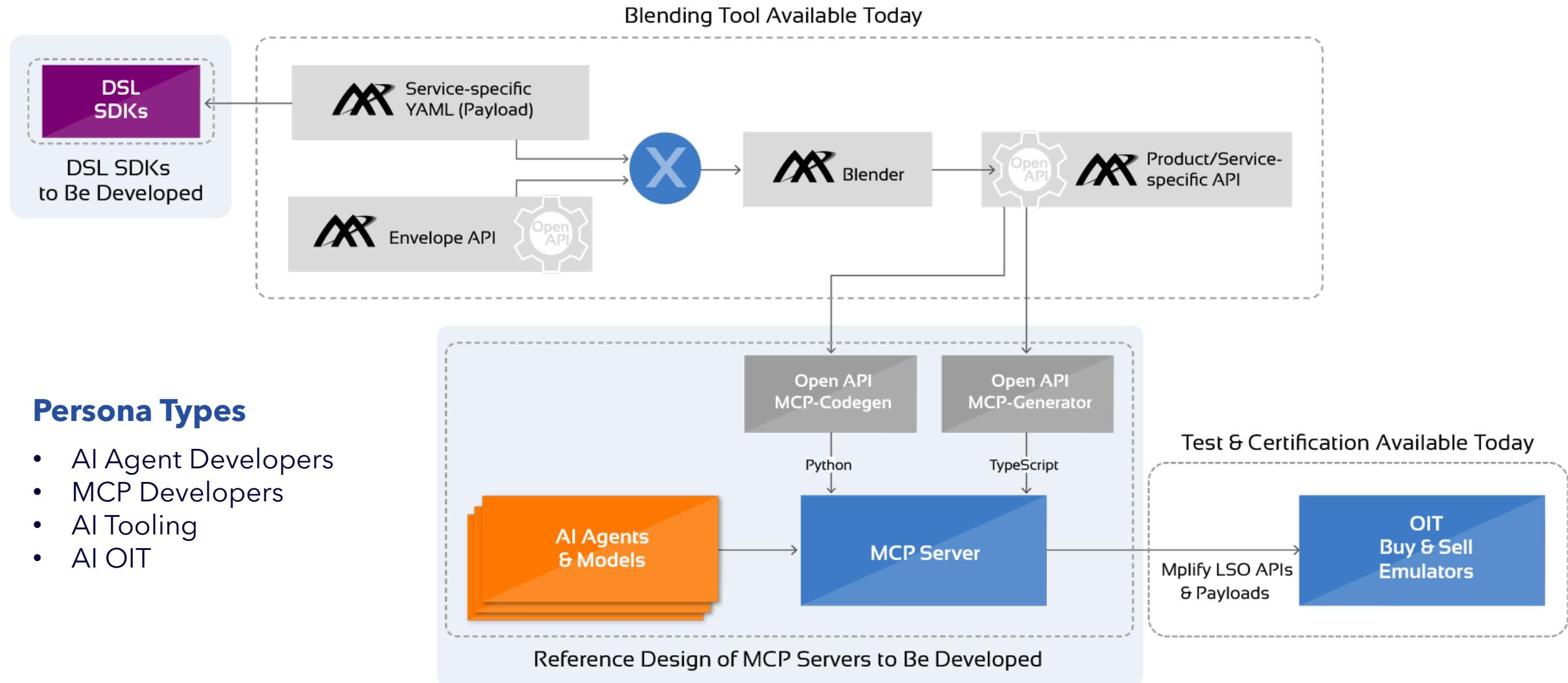
Mplify MCP and DSLs for AI

- Network API Payloads and DSLs for CAMARA use case APIs (ex: Quality on Demand)
- MCP Server for Mplify NaaS services

Mplify Security Profile

- OAuth 2.0 client credential flow
- OpenID Connect (OIDC) Hybrid Flow

MCP Toolchain – AI Integration of Mplify LSO APIs & Payloads



LSO Automation Certification Roadmap for APIs, MCP and Payloads

LSO APIs	Envelope	AI API Wrapper	AI Agents & Models	LSO-Enabled Product Payloads						
	API	MCP	Domain Specific Language	Carrier Ethernet	Internet Access	SD-WAN	Cross Connect	Wave-length	Pre-Standard Payloads	
Address Validation	✓	✓	✓							
Product Offering Qualification	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Quote	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Product Order	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Product Inventory	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<p>✓ : Existing certifications</p> <p>✓ : 2026 planned LSO-Enabled Product Payloads certifications (certification readiness depends on standardization)</p> <p>✓ : Future certifications</p>										

NaaS Cybersecurity for AI (Medium Term)



Cybersecurity for AI

Next Frontier added to
Mplify SD-WAN, SSE, ZT &
SASE Certification

Cybersecurity for AI

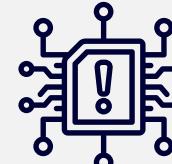
Cybersecurity for AI



Classification of
AI Workloads



Zero Trust
Policies

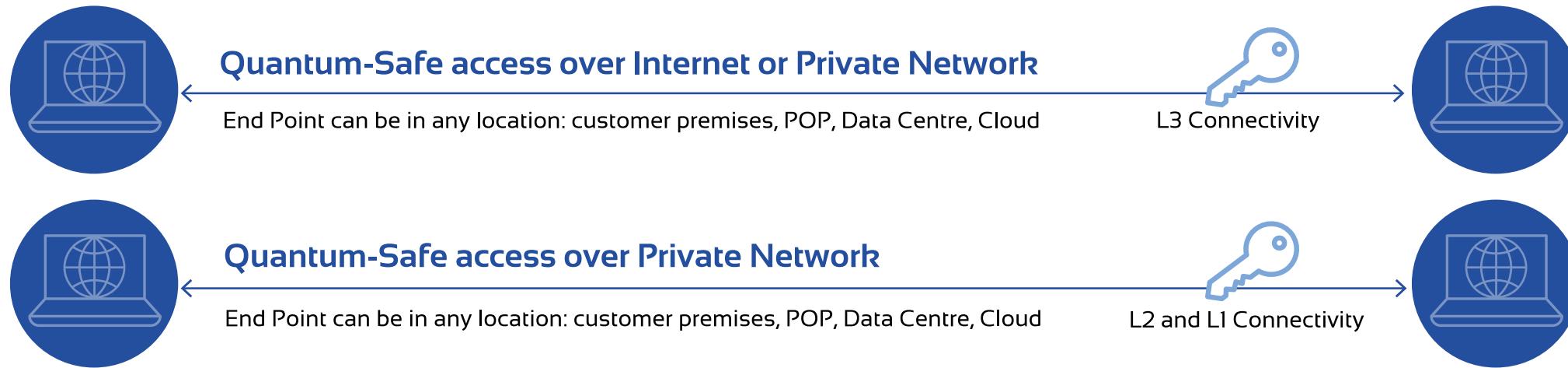


AI Threat
Assessment



AI Firewalls
for Segmentation

Network as a Service – Quantum-Safe Networking Standards & Certification



Subscriber and Inter Provider Use Cases

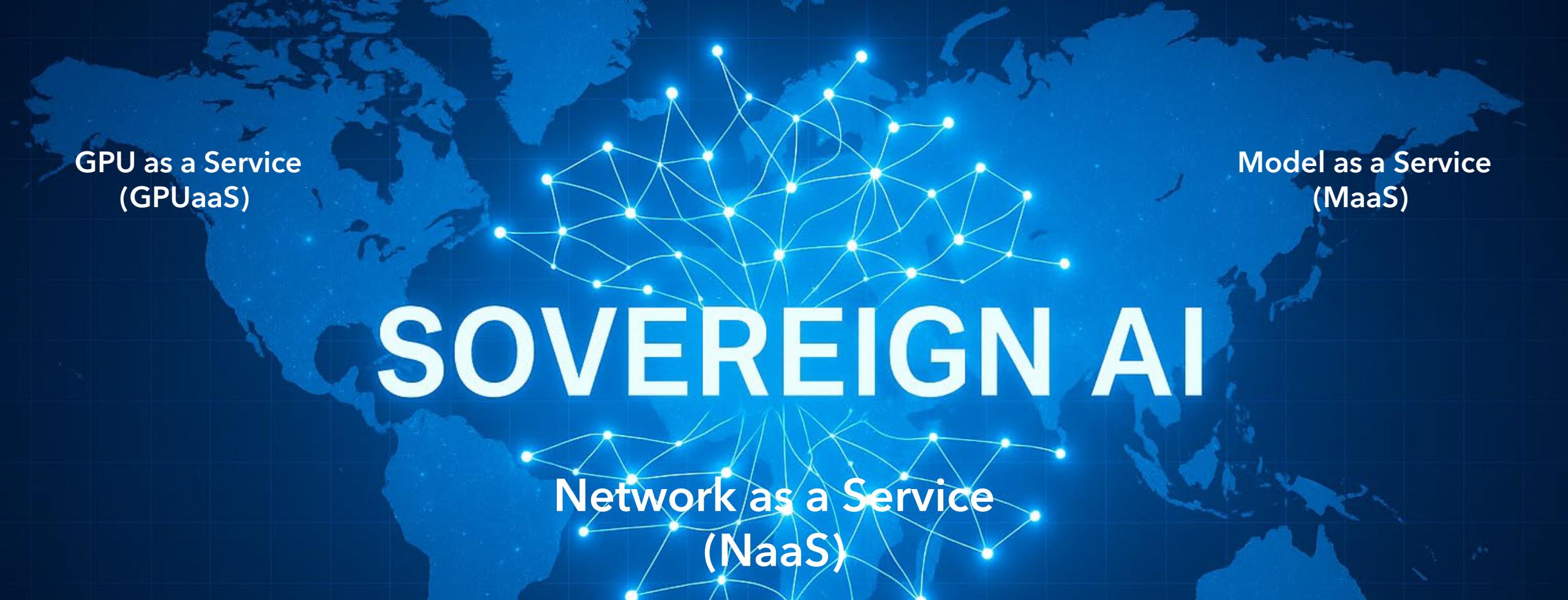
ON-DEMAND SET-UP

- On-demand VPN and Internet Access
- On-demand Post Quantum turn-on/off
- Monitoring on Customer Portal
- NOC/SOC for managed solution

SYMMETRIC KEY AGREEMENT

- Keys can be used to secure any channels (IPsec, OTNs, MACsec, TLS, MQTT)
- Continuous keys rotation
- Centralized key management
- Crypto-agile as the underlying cryptographic primitives can be upgraded or replaced

NaaS Cybersecurity for AI (Long Term)



GPU as a Service
(GPUaaS)

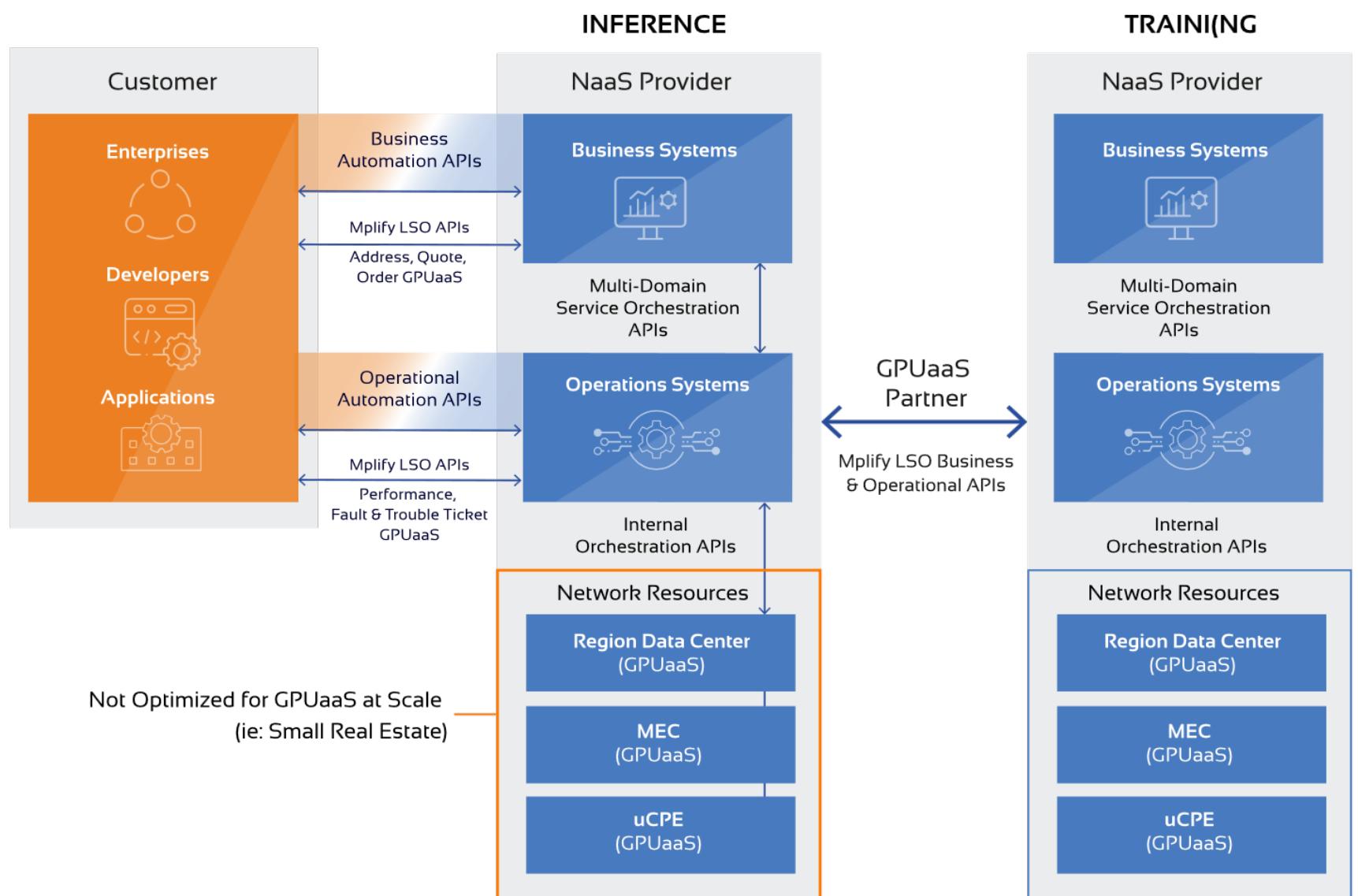
Model as a Service
(MaaS)

Network as a Service
(NaaS)

Over 30 Sovereign AI country deployments going
into production worldwide by telecom providers

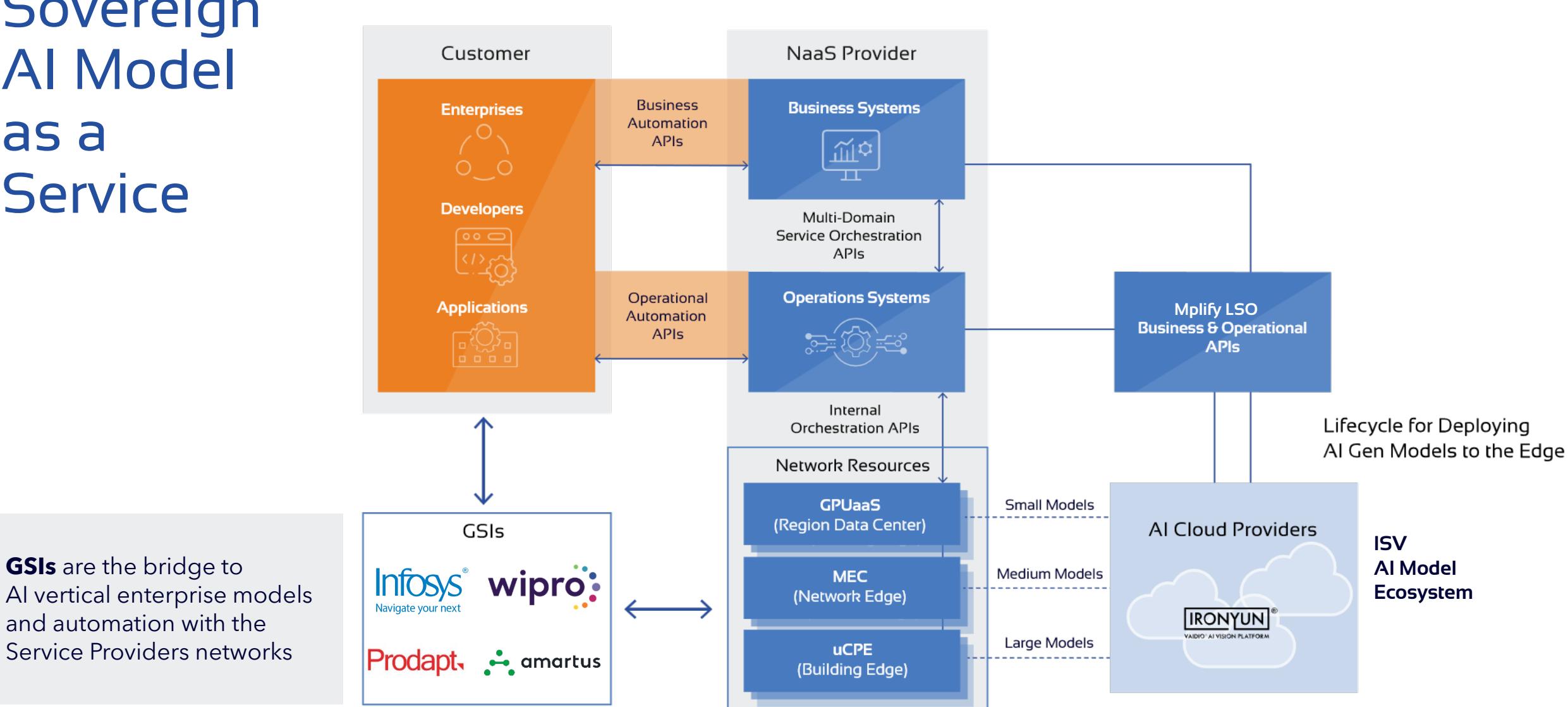
The sovereign AI market is projected to grow
substantially, driven by government and enterprise
demand for domestic control over AI technology.
According to **Oppenheimer** it is projected to be a
\$1.5 trillion market opportunity.

Sovereign AI GPU as Service



Mplify LSO APIs for GPUaaS

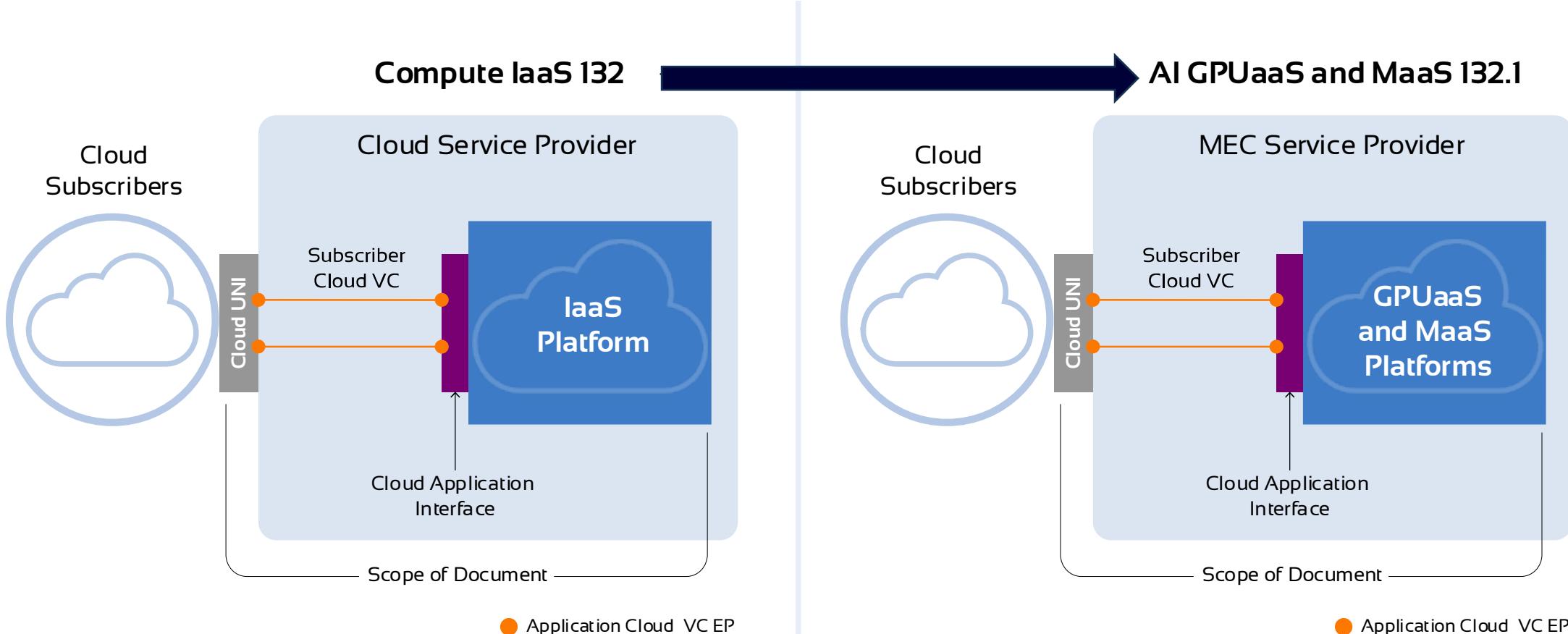
Sovereign AI Model as a Service



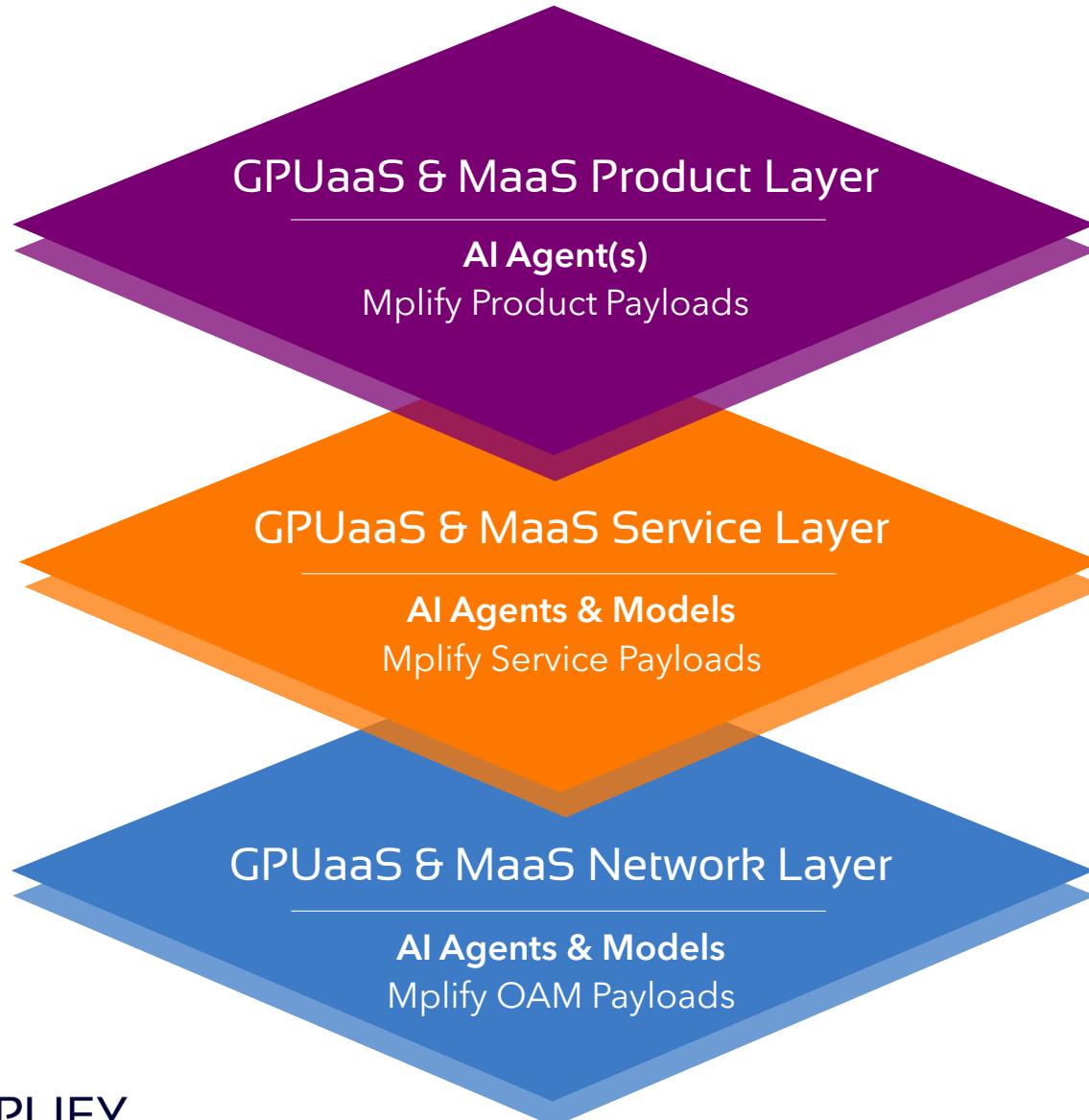
GSIs are the bridge to AI vertical enterprise models and automation with the Service Providers networks

Mplify LSO APIs for AI Model as a Service

Evolve Mplify 132 Edge Computing IaaS Standard to include GPUaaS and MaaS



Mplify Payloads/DSLs for GPUaaS and MaaS with Certifications



Ontology – what entities exist (EVC, OVC, UNI, etc.)

Semantics – what each property means (e.g., frameDelay, Performance tier, etc)

Constraints – valid values, enumerations, and relationships

Context – how one object relates to others (e.g., SLS belongs to an OVC)

New Mplify Market Brief - NaaS for Agentic AI

- **AI is shifting** from single-response to continuous reasoning, driving massive inference growth.
- **Networks transform** from utility to coordination layer, enabling reasoning flows across distributed environments.
- **Agentic AI requires** deterministic, programmable, on-demand fabric with automation across providers.
- **NaaS is the automated supply chain** uniting certified connectivity, automation, cybersecurity, and revenue services.
- **NaaS** depends on standardized LSO automation.
- **Certification** validates, distinguishes strategic AI partners.



MARKET BRIEF

NaaS: The Automated Network Supply Chain for Agentic AI

November 2025

Created by:
Stan Hubbard, Principal Analyst





Questions?

Thank You



Global NaaS Event