

GSMA & AI

Overview of GSMA 's AI Strategy and Activities

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AI



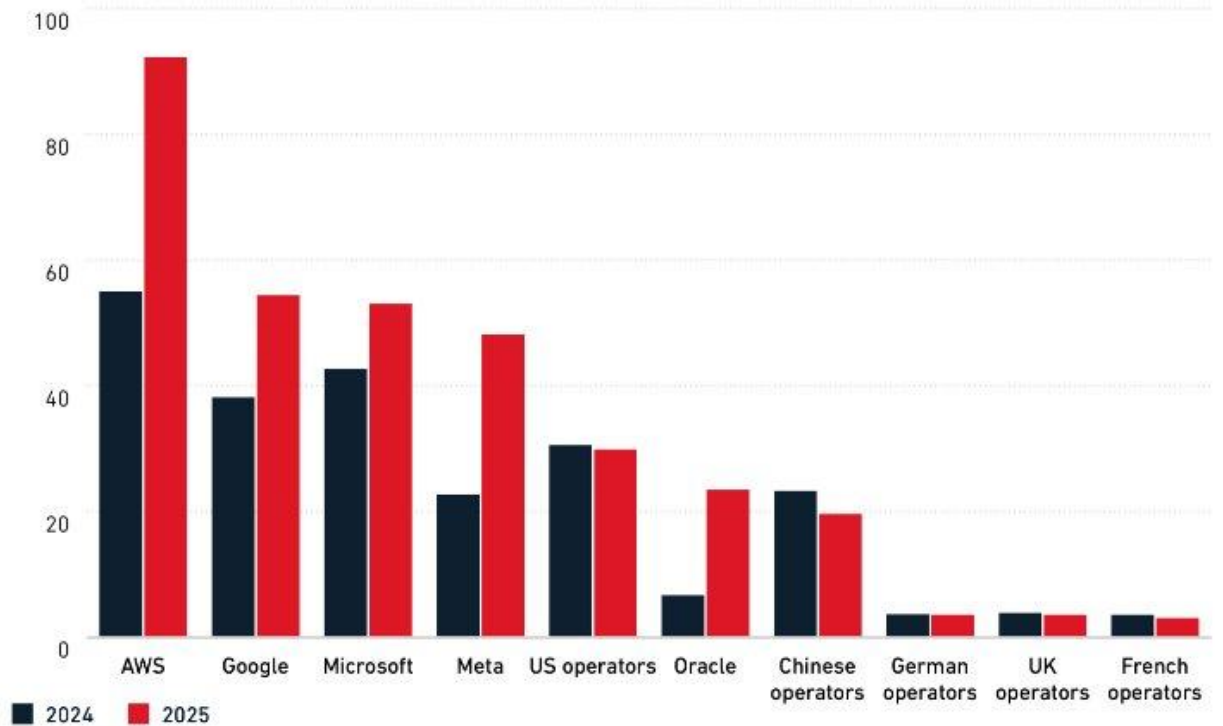
Problem Statement

AI runs on telecom networks

- But much of the value, influence, and decision-making power is increasingly being captured by others
- Global telecom traffic is set to soar; MNOs will bear the cost and see no value benefit – again
- Telcos cannot keep up with the level of Capex investments
- Telecoms industry needs to secure a meaningful role in the future AI value chain before its role is defined for it by others

Hyperscaler capex is growing at 65% per year

Capex (\$ billion), nine months to September



Source: GSMA Intelligence, company websites

Telco x AI Trends

AI Trends for 2027 - 2030

As artificial intelligence (AI) moves beyond data centres into real-world

The Agentic Internet
& Economy

Trust, Governance
& Sovereignty

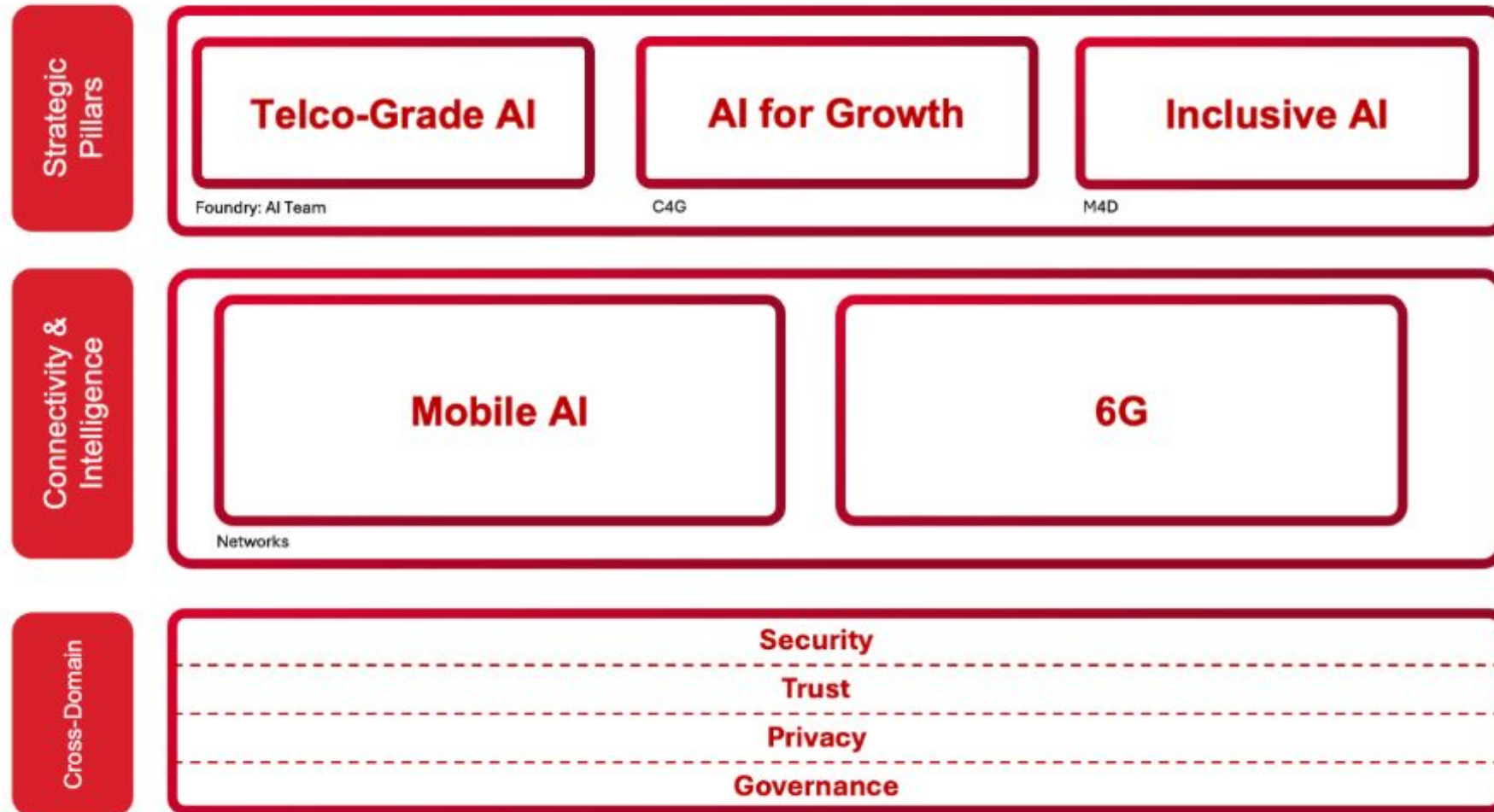
Workforce & Operational
Transformation

Hybrid
AI-Native
Connectivity

Physical &
Mission-Critical
AI

GSMA & AI

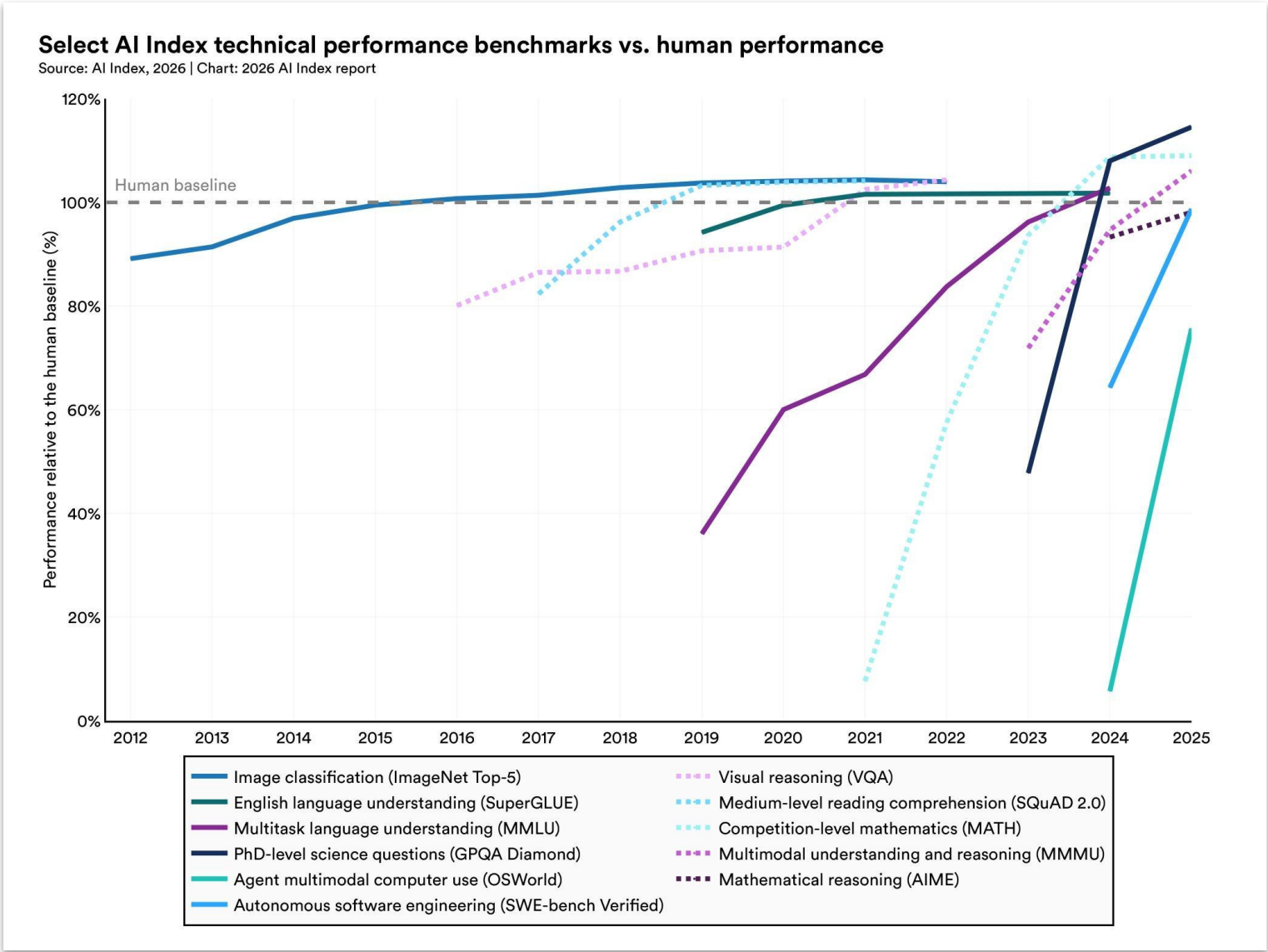
Strong Foundations supporting Strategic Pillars



Telco-Grade AI



Challenge AI has made rapid progress



Source: Stanford AI Index



but AI doesn't yet speak telco

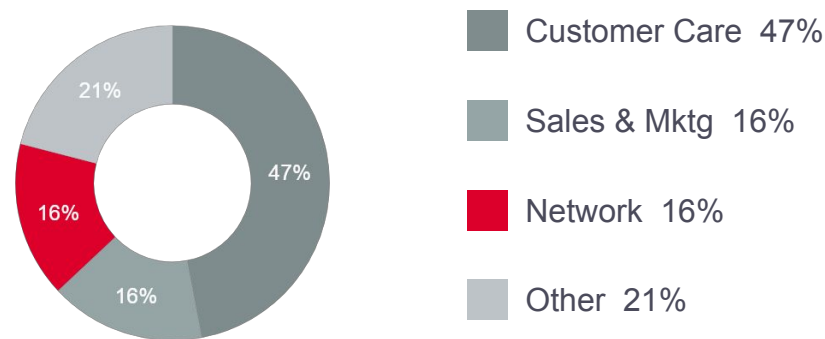
Frontier models underperform on telecom-specific tasks — from interpreting network data to understanding 3GPP standards and automating network operations.



AI is Failing to Transform Networks

THE MISMATCH

Only **16%**
of Gen AI deployments target networks



THE OPPORTUNITY

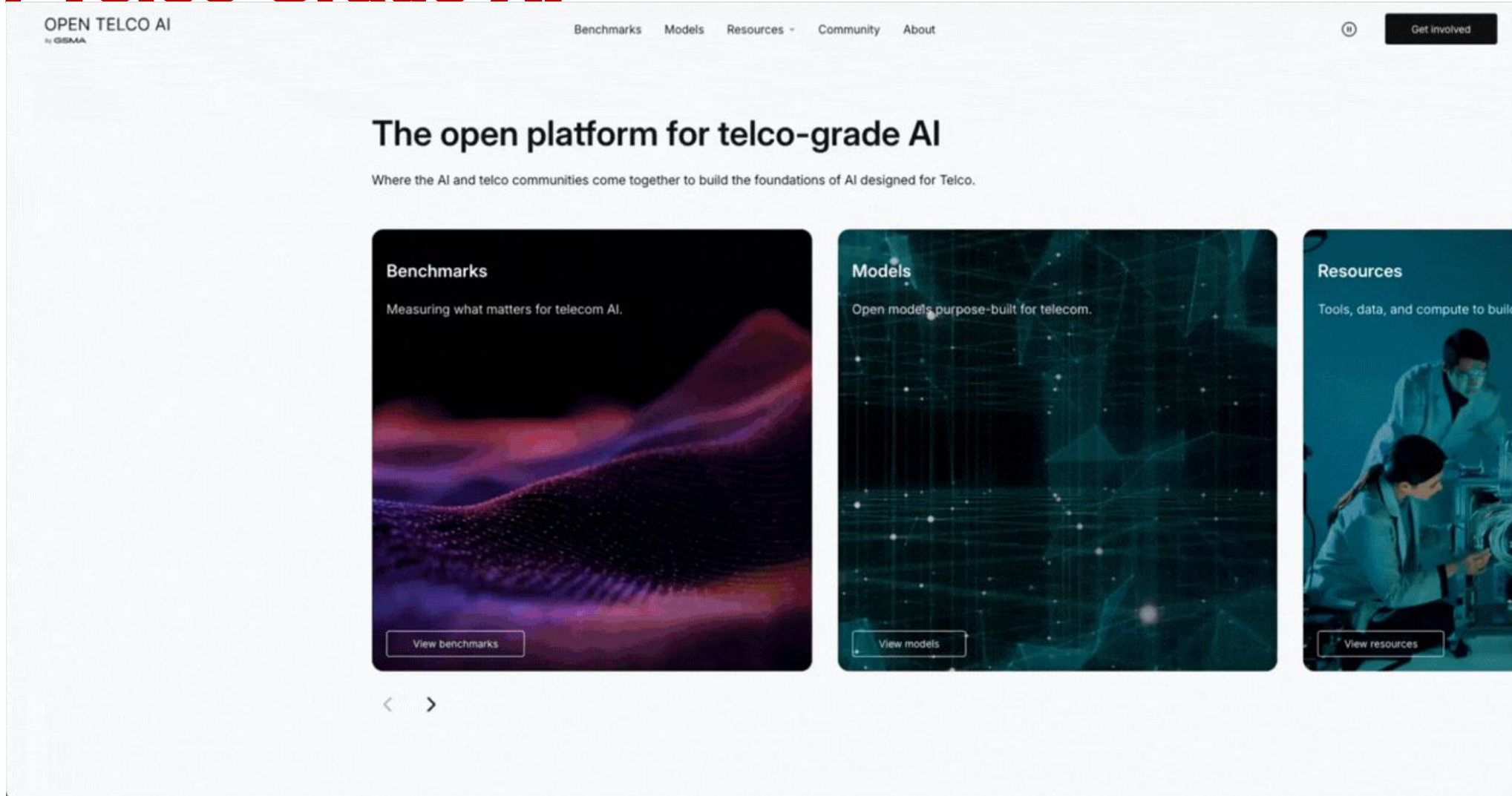
34%
of total opex goes to network operations



Bottom line: The industry risks spending billions on AI that doesn't deliver ROI on its largest cost center



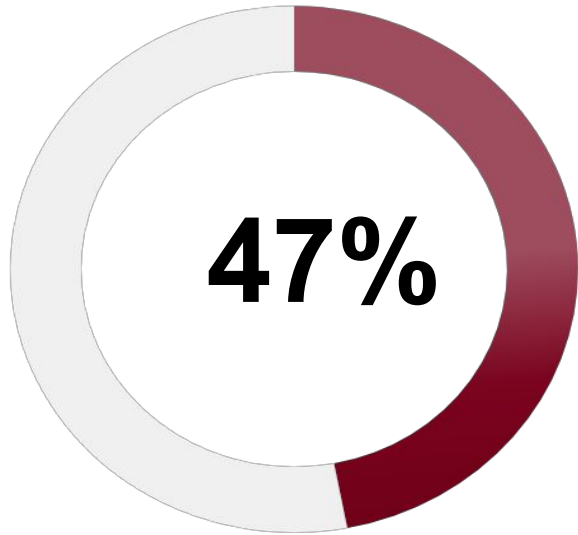
open-telco.ai: **Building the Foundations of Telco-Grade AI**



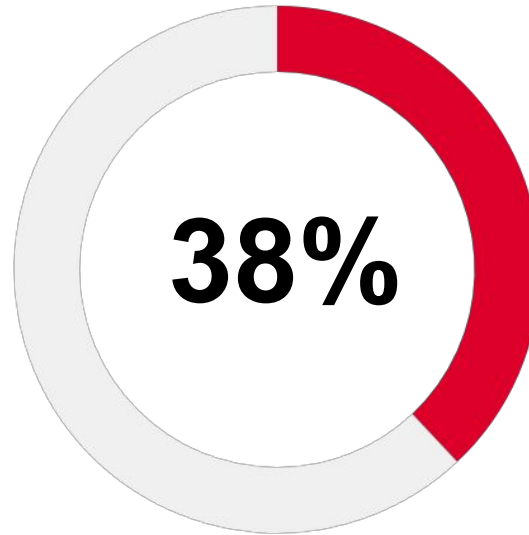
AI for Growth



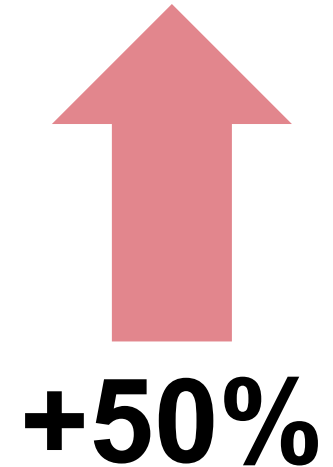
The AI Economy has shifted in the last year



Of new AI deployments have **a revenue objective**



Of AI deployments in telco **data centres are now live**



Hyperscaler capex growth **in 2025**



Telcos are already in the AI economy



Vodafone × Google
\$1B / 10 years
GPU capacity, cloud AI
Europe + Africa



KT × Microsoft
Multi-billion \$
South Korea



Indosat × Nvidia
Sovereign AI factory
Bahasa LLMs,
Indonesia



Orange × Meta/OpenAI
Language translation
Europe + Africa



Telia × Brookfield
Sweden's largest
sovereign AI initiative
Sweden



Telenor × Red Hat
AI factory
Scale + sovereignty
Nordics



KDDI × Avita
Physical AI
Japan



Deutsche Telekom ×
Nokia
AI-native networks
Open RAN,
Europe

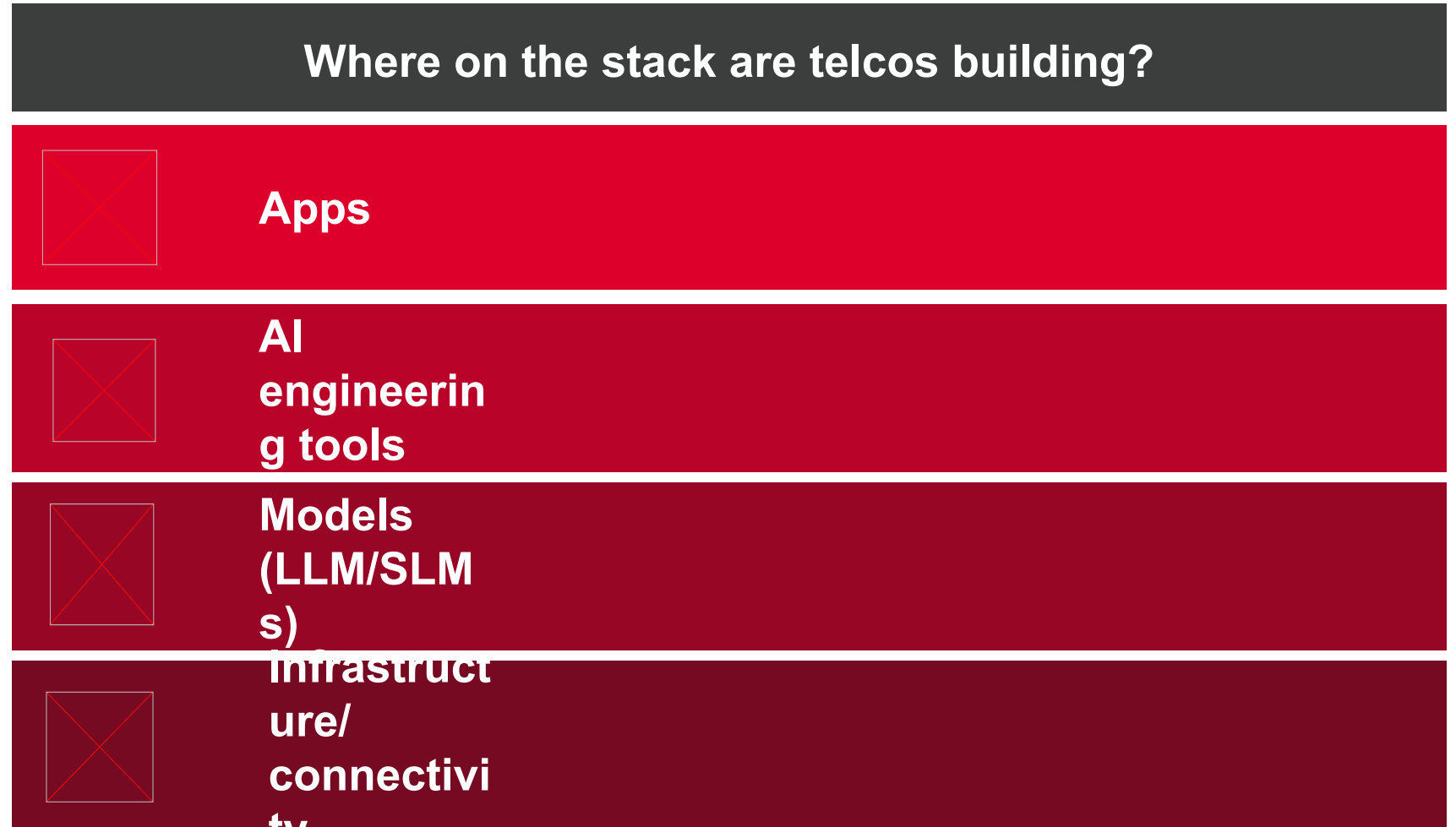


VEON × BSC
Kazakh-language LLM
Central Asia



Telcos and the AI Stack: A Shifting Position

Most telco AI investment is focused on infrastructure, but opportunities are emerging higher up the stack.



How the GSMA Helps

AMBITION

Support telcos in capturing value from AI



Inference Report and Calculator



AI Use case library

Research

Deepdive (w. GSMAi) into key monetization opportunities

1. Edge AI
2. On-device
3. AI Factory
4. Embodied

Tools

Industry wide tools to support Industry build businesses cases

1. Inference Calculator

Use cases & Events

Evidence of AI monetisation in practice

1. AI use case library
2. MWC Events

Inclusive AI



AI is not built for the vast majority of the world's population

Problem:

- AI is trained on a few dominant languages
- Most languages lack data and representation

Impact:

- Poor performance and biased outputs
- Limited adoption and digital exclusion

Opportunity:

- Models in local languages, domain/task-specific models

50%

of internet content is
in English

5%

of the global population
speaks English natively



Closing the African Language Gap

"AI Language Models in Africa, By Africa, For Africa" — closing the region's language gap in AI, ensuring Africa's voices are represented in the global digital future.



35+ Organisations

Operators, startups, research institutions and NGOs from across the continent



5 Workstreams

Data, Compute, Talent, Innovation & Market — with cross-cutting policy work



12-Month Pilot

Accelerating open-weight African language models, demonstrated at MWC Barcelona, Kigali, Doha 2026

African Union Summit Feb 2027 final models

Post-Barcelona momentum: Swahili reasoning model demo, compute partners (AMD & Cassava), AUDA-NEPAD agreement, AU Summit 2027 north-star milestone.



Outcomes

What we've achieved so far and what's to come.

At MWC Barcelona



Open Models:

- First reasoning Model in Swahili
- Common Lingua (detects 61 African Languages from text)



African Talent & Compute Map



Confirmed compute Partners AMD, Cassava



African Language Evaluation Platform.
Modelchorus.com

At MWC Kigali & Doha



Open Models:

- ASR and Chat Models in Malagay, Amharic, + 2 others



In market pilot with 2x models



First set of African Reasoning Benchmarks for upto 20 languages



Addition compute partners



Foundation: Connectivity & Intelligence

GSMA 6G & Mobile AI Communities

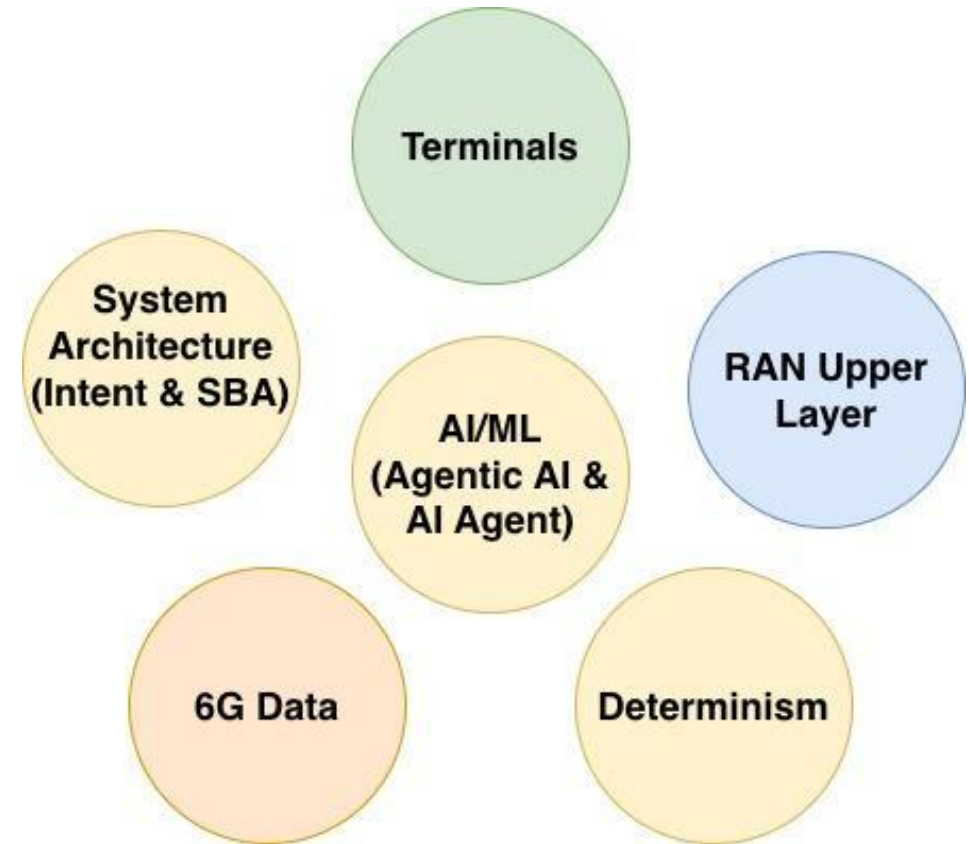


6G Task Force (6GTF)



6G Community

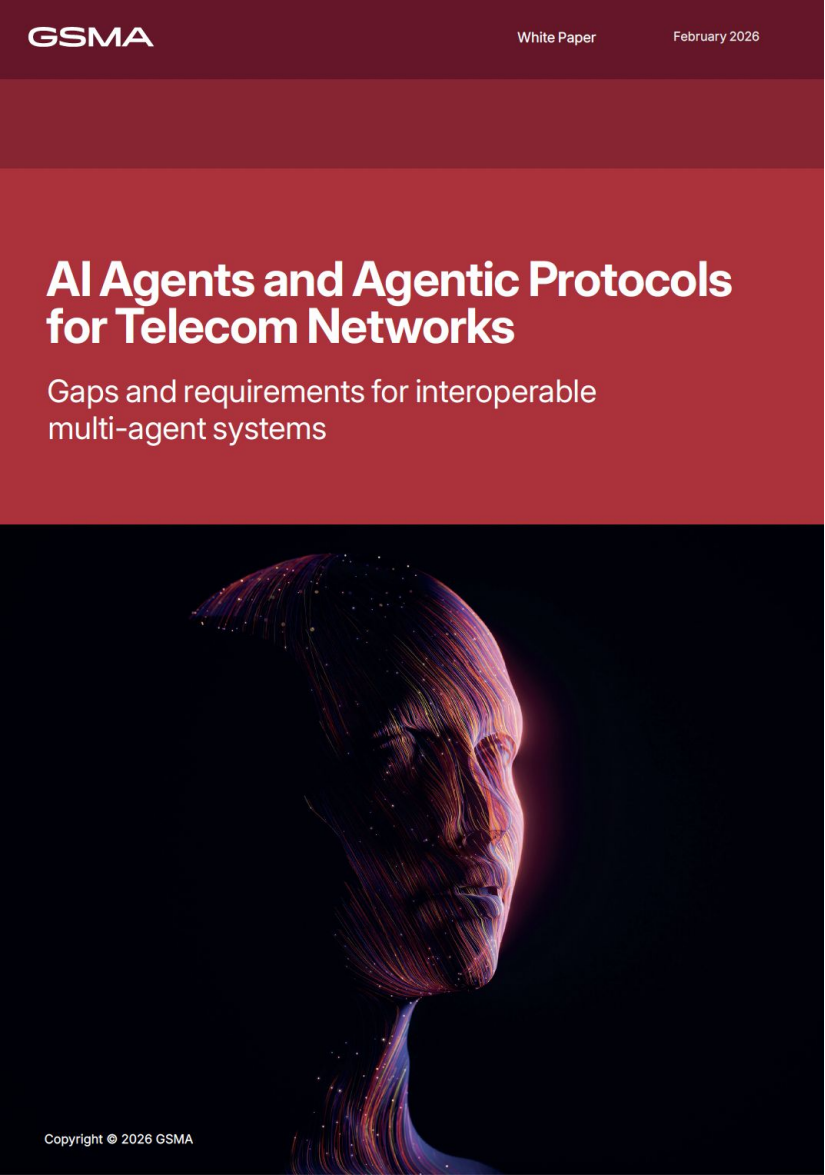
Goal: To drive early industry alignment on 6G requirements, architecture, and service enablers, shaping the global 6G roadmap



GSMA brings the industry together to shape 6G through early, coordinated engagement with global standards

Release: MWC Barcelona 2026

Contributors:

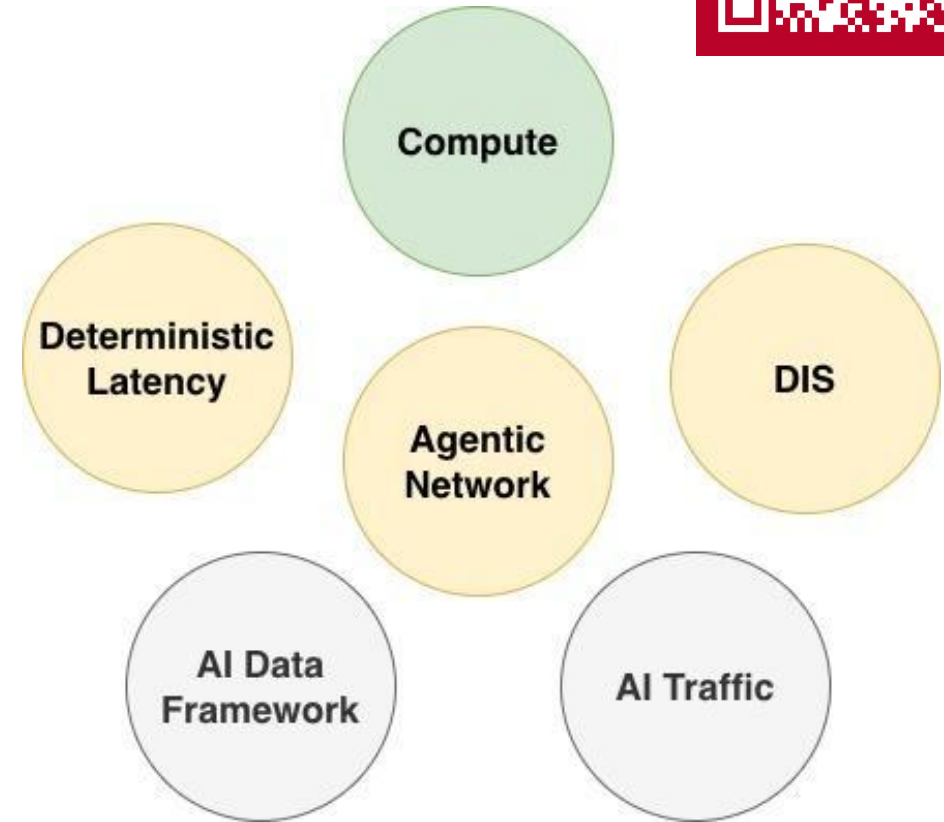
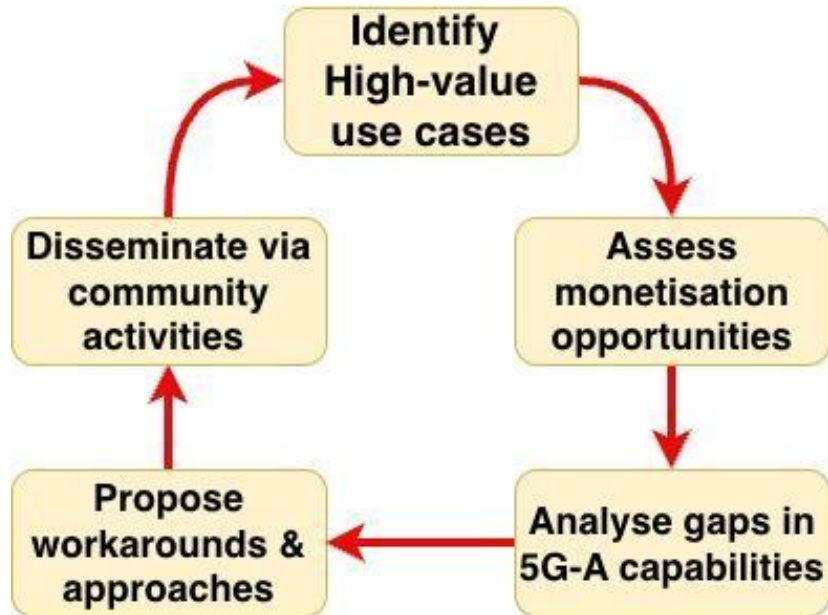


Mobile AI Community (MAIC)



Mobile AI Community

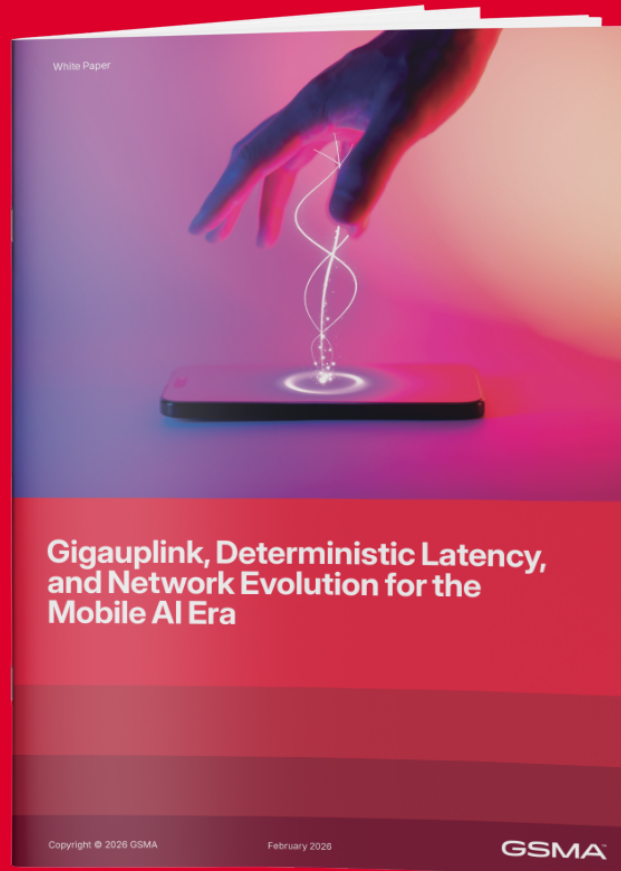
Goal: To align industry efforts on AI for Networks and Networks for AI, accelerating practical AI adoption in 5G-Advanced networks



GSMA leads industry efforts to scale 5G-A and shape 6G by enabling early, coordinated engagement in 3GPP

LATEST RELEASE

Gigauplink, Deterministic Latency, and Network Evolution for the Mobile AI Era



Download the report



Foundations: Security

What is Changing - Mythos

- **Advanced AI models analysing software and source code**
- **Mythos and peer models accelerate vulnerability discovery**
- **Months of work now achievable in weeks**
- **Driving a fundamental shift in cyber risk**
- **Implications for Telecom Security and Industry Response**

A fundamental shift in cyber risk, requiring board level awareness and action



Rising Cost of Security

- **Token / compute costs:**
 - Up to 8x previous model generations
- **Increased spend required for:**
 - Detection
 - Resilience
 - Recovery
- **Trade-off:**
 - Patch speed vs service stability vs. regulatory risk

Cybersecurity is becoming a major financial decision, not just a technical one





Collaborative Industry Action

- Global CISO convened
- Intelligence sharing across operators and vendors
- GSMA Board and CEO engagement initiated
- **Desired collaboration with:**
 - Vendors
 - Governments
 - AI ecosystem stakeholders

Collective defence is essential — no operator can address this alone

Thank you

