Mobile Intelligence Integration Index 2026

Mobile AI convergence empowers tokenomics

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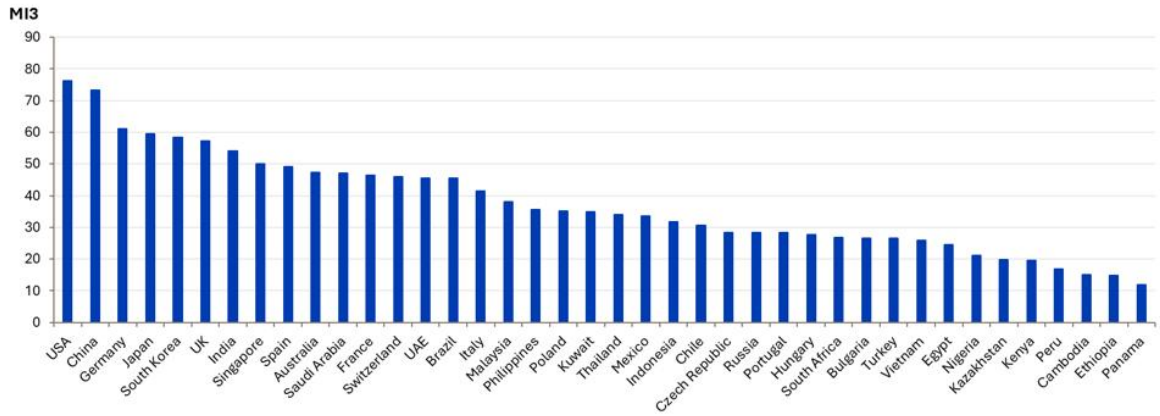
Executive summary

The convergence of artificial intelligence (AI) and mobile telecommunications is driving unprecedented transformation across the global technology landscape. AI model innovation continues to advance rapidly, with agentic AI emerging as the next frontier. This evolution is driving a historic surge in capex. Telecom operators are strategically positioning themselves at the intersection of connectivity and intelligence. Their investments span multiple dimensions: building robust AI infrastructure, developing AI-enhanced services, and developing platforms that enable enterprise and consumer AI applications. These mobile intelligence integration activities will significantly influence countries' AI development strategies and adoption rates.

To support and accelerate the mobile intelligence integration, GTI Alliance and Omdia joined forces to define the Mobile Intelligence Integration Index (MI^3) 2026. The framework measures how effectively different countries and markets are integrating mobile technologies with AI capabilities. The methodology evaluates multiple dimensions, including mobile broadband maturity, intelligence capability maturity, and mobile intelligence adoption.

40 countries from Africa, the Americas, Asia & Oceania, Europe, and the Middle East were studied and benchmarked with the MI^3 2026 model. The 40 countries represent approximately 5.85 billion people, roughly 70.5% of the world's total population. The chart below shows their ranking.

Figure 1: 40 countries studied across five global regions



Source: GTI Alliance and Omdia

Through the analysis and ranking, we can obtain the following key findings:

- The gap between developed and developing countries is still significant.
- Mobile intelligence adoption is significantly relevant to infrastructure maturity.
- Both hardware infrastructure and the software developer ecosystem impact AI adoption in enterprise markets.
- Mobile broadband connectivity is critical for consumer AI adoption.

Looking forward, tokenomics and token-centric services are emerging in advanced markets, offering a new way for global telecom operators to meet customers' demand for AI services, monetize their connectivity and computing infrastructure, and move toward an AI-centric business and organization.

To promote mobile intelligence integration, telecom operators could accelerate their transformation into token-centric businesses through extensive partnerships and innovation, and vendors should center AI demand and AI-based solutions in next-generation infrastructure. More importantly, regulators and industry authorities can take more proactive approaches to fostering and encouraging the development of mobile AI ecosystems, including but not limited to

- Friendly regulations on mobile spectrum and infrastructure to help the industry expand broadband connectivity and bridge the digital divide efficiently
- Policies to promote the use of open-source AI models in the public sector and encourage the adoption of open-source software across the nation's economy and society to improve AI accessibility, accelerate innovation, and realize customization and data sovereignty

- Invest in STEM education and lifelong learning programs to support talent development in the AI era and establish a bridge between educational institutions and industry to ensure training programs align with emerging job requirements

In all these areas, leading countries and industry players can join forces to help less developed countries. The global telecom industry can leverage its experience in narrowing the digital divide to help less-developed countries integrate AI capabilities into their economies and societies. Global industry organizations, including GTI Alliance, could become an important international collaboration platform where leading countries and industry players help less-developed countries narrow the gap in advanced technology.

AI is driving a historic surge in capex

AI model innovation is continuing and agentic AI is emerging

AI has emerged as the defining force shaping global economic and technological landscapes, fundamentally transforming how nations compete, businesses operate, and societies function. The year 2025 marked a pivotal transformation in AI, characterized by a fundamental shift from the relentless pursuit of ever-larger models to a more nuanced, efficiency-driven approach centered on agentic systems and practical applications.

After an explosive period between 2019 and 2021 when AI model sizes multiplied by 100×, the industry witnessed a dramatic deceleration in model growth. The largest models plateaued around 1.6–2 trillion parameters, with minimal advancement since 2021. This represented barely half a doubling in size over nearly five years, a stark contrast to the exponential growth that preceded it.

This slowdown was not indicative of stagnation but rather reflected a strategic pivot in the industry's approach to AI development. Multiple factors contributed to this shift: the discovery that mixture-of-experts models scaled better through increasing the number of experts rather than raw parameter counts, and the realization that alternative improvement pathways offered better returns on investment.

While the frontier model growth stalled, the small model ecosystem experienced explosive growth. "Small" was a relative term, as the typical small model size shifted upward from the 100 million–1 billion parameter range to 1–14 billion parameters. This reflected developers' efforts to bring greater flexibility and multi-modal capabilities to edge devices and local deployments. Under this trend, a new category of midsize-tolarge open-source models emerged, with notable examples including LLaMa 3.1-405B, Qwen3-235B-A22B, and Qwen3.5-397B-A17B.

Meanwhile, the emergence of sophisticated agentic AI systems is fundamentally reshaping how AI delivers value. True agentic systems distinguish themselves by their ability to generate and execute program code while coordinating multiple external tools.

Standardized architecture for agent systems began crystallizing around projects like Model Context Protocol (MCP), OpenClaw, OpenShell, as well as commercial products, such as Claude Code, Cowork, and NemoClaw. This architecture provided agents with virtualized, sandboxed access to tool APIs, instructions, and data assets organized into "skills" within a file system. These sandboxes typically ran on CPUs rather than GPUs, representing a significant shift in computational resource allocation.

The coordination mechanism for these diverse tools operated through the agent's context window, which became the central nervous system of agentic operations. This elevated context windows from a technical specification to a critical architectural component, driving demand for new memory hierarchies and storage solutions.

The agentic revolution triggered a fundamental rebalancing of AI infrastructure requirements. The target CPU-to-GPU ratio moved toward 1:1, with new dedicated CPU-only compute racks designed to consolidate agent sandboxes, retrieval-augmented generation (RAG) vector databases, and related tools. Meanwhile, a novel "context memory processing" tier emerged. This intermediate layer between memory and storage was specifically designed for context window offload and retrieval, addressing the quadratic scaling of transformer memory usage with context length.

AI investment boom

The rapid adoption of generative AI (GenAI) technologies created unprecedented demand for cloud infrastructure. Companies are racing to build capacity for AI training, inference workloads, and enterprise AI applications that require massive computational resources.

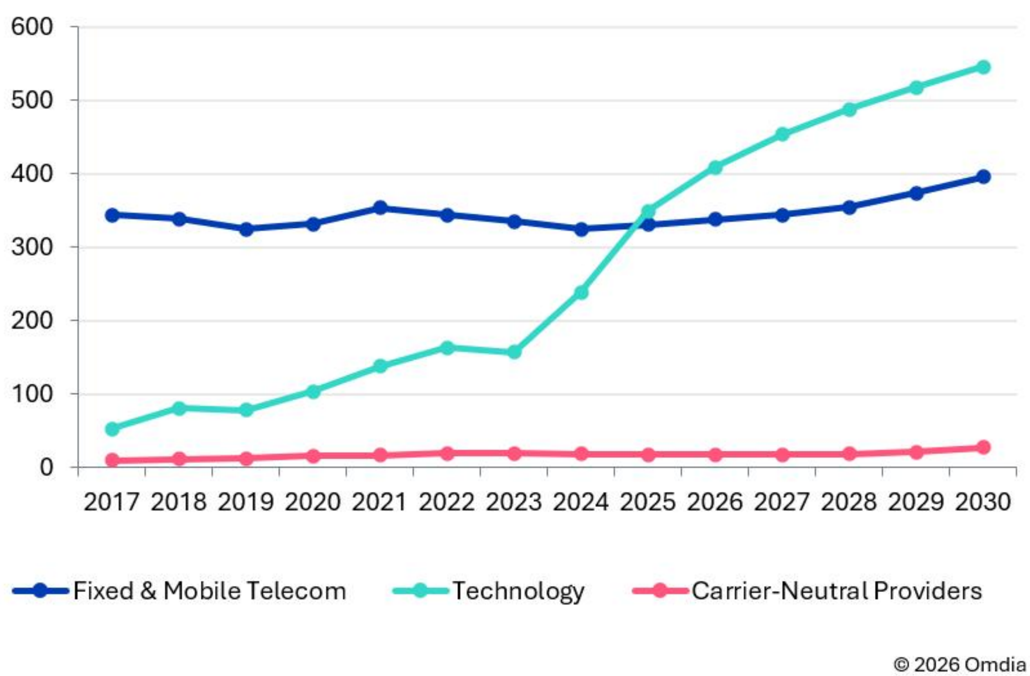
In 2025, the information and communication technology (ICT) infrastructure landscape underwent a historic transformation, marked by unprecedented capex from Big Tech companies, fundamentally altering industry dynamics. The five major technology hyperscalers—Amazon, Alphabet, Apple, Meta Platforms, and Microsoft—collectively invested $388bn in infrastructure, representing a staggering 62.7% year-over-year (YoY) increase. This surge drove technology capex to constitute 54.3% of total ICT industry spending, up from 42.2% in 2024.

Most remarkably, 2025 marked the first time Big Tech overtook traditional telecom operators in both revenue and investment. While telecom operators invested $306bn, Big Tech's $388bn investment demonstrated its dominant position in infrastructure development. This is five times the 2019 benchmark, showing rapid growth in technology infrastructure investment.

AI will fundamentally dominate the infrastructure investment landscape through 2030, with technology sector capex potentially reaching $600–800bn annually by 2028–30. This projection assumes growth moderates from 2025's extraordinary 62.7% YoY increase to a more sustainable 15–25% annually as the market matures.

In contrast, traditional telecom infrastructure investment will experience moderate growth from 2025's $306bn to approximately $350–400bn by 2030, representing just 3–5% compound annual growth rate (CAGR), far below technology sector rates. This shift makes AI infrastructure the dominant investment theme of the decade, reshaping competition and pushing telecom operators to form strategic partnerships, monetize assets, and transform operations with AI to stay relevant in an increasingly AI-driven communications landscape.

Figure 2: Capex – Technology vs. Telecom, 2017–30



Source: GTI Alliance and Omdia

Telcos embracing AI in their infrastructure and services

Telcos' strategic investments in AI infrastructure

The proliferation of AI applications drives the growth of network traffic. Omdia forecasts that net new AI traffic will grow at an 85% CAGR from 2025 to 2035, resulting in a 17% CAGR in total network traffic.

Meanwhile, governments are increasingly prioritizing AI sovereignty for national security and data governance. This approach emphasizes the use of their own infrastructure, data, talent, and regulatory frameworks to independently develop, deploy, and govern AI technologies rather than relying on foreign organizations.

Driven by surging AI-related network traffic and evolving sovereignty requirements, telcos are committing substantial multi-year capex to build AI infrastructure, including cloud platforms, data centers, GPU-as-a-Service (GPUaaS) offerings, and broadband networks connecting AI data centers. Several operators have emerged as front-runners, each demonstrating distinct approaches to AI infrastructure investment.

- Deutsche Telekom is leading Europe's telco AI infrastructure push with a €1bn project to deploy 10,000 NVIDIA GPUs in Munich, creating what it claims will be Europe's largest telco-operated AI factory.
- Iliad Group has committed €3bn to AI infrastructure, research, and applications, with €2.5bn allocated through its data center subsidiary, OpCore, to expand toward multi-gigawatt capacity across Europe.
- SK Telecom has established itself as a major player in Asia & Oceania, with AI data centers already accounting for 4% of its revenue in 3Q25. The company targets ₩1tn in revenue from its AI infrastructure business by 2030.
- SoftBank is building a nationwide AI infrastructure that pairs distributed data centers with AI-RAN across Japan. SoftBank has expanded its GPU offering to around 10,000 NVIDIA chips and launched the AI Data Center GPU Server platform in October 2025, with flexible rental periods ranging from seven days to one year.

Geopolitical tensions and national data residency requirements are creating favorable conditions for telcos as trusted domestic providers. Government initiatives explicitly favor local operators over international hyperscalers, with programs like the European Union's AI Gigafactories and Canada's Sovereign AI Compute Strategy providing both funding and policy support.

The growing focus on AI sovereignty is reshaping partnership dynamics. The preferred model in many markets has become “Sovereign AI + NVIDIA,” in which telcos provide the infrastructure and sovereign compliance, partnering with global technology leaders for hardware and software capabilities. This approach allows operators to deliver sovereign-compliant AI solutions while mitigating technical and execution risks.

AI is creating new monetization opportunities for telcos in the enterprise market

As sovereign AI requirements, enterprise digital transformation, and the need for trusted infrastructure providers converge, telcos are finding significant monetization opportunities in the AI-related enterprise market.

GPUaaS has emerged as a primary revenue stream for telcos targeting enterprise customers. The global telco revenue from GPUaaS is projected to increase at a remarkable 122% CAGR between 2023 and 2032, potentially exceeding $15bn by 2032. This explosive growth reflects enterprises’ need for flexible, scalable compute resources without the burden of massive upfront capital investments.

The AI sovereignty imperative creates significant monetization opportunities in regulated industries and government sectors. Enterprises in financial services, healthcare, defense, and public administration face stringent data residency and sovereignty requirements that favor domestic telco providers over international hyperscalers.

Beyond raw compute capacity, telcos are monetizing through integrated solutions that combine infrastructure with software, applications, and professional services. Meanwhile, telcos need partners to bring cutting-edge AI expertise and full AI stacks, drive demand, and help them bypass supply chain issues, particularly from AI specialists and vertical industrial experts. Broad partnerships can help telcos monetize by enabling specific enterprise applications rather than simply providing generic compute resources.

Early financial indicators validate the enterprise monetization opportunity. SK Telecom’s AI data centers already account for 4% of total revenue in 3Q25, with the company targeting ₩1tn in revenue by 2030. Bell’s AI Fabric is projected to generate C$100–150m in adjusted earnings before interest, taxes, depreciation, and amortization (EBITDA) per year, representing a meaningful contribution to the company’s overall financial performance.

The enterprise AI infrastructure market is a significant, growing opportunity for telecom operators, especially those that can deliver sovereign-compliant solutions, flexible commercial models, and industry-tailored value-added services.

Telcos are targeting hyper-personalization consumer AI opportunity

Omdia's service provider survey indicates that telco executives have identified creating hyper-personalized services and bundles as the leading AI opportunity in the consumer market, reflecting a strategic shift from traditional one-size-fits-all approaches to data-driven, individualized customer experiences.

By leveraging AI and advanced data analytics, telecommunications operators can now deliver tailored offers to specific consumer groups with unprecedented precision. The technology enables telcos to analyze granular behavioral data, including browsing habits, purchase history, and app usage patterns, to create highly targeted campaigns that resonate with individual customer needs and preferences. China Mobile, for instance, has launched football-fan-exclusive packages at Shanghai Shenhua Stadium, combining 5G-A network acceleration with premium content and exclusive discounts. This shows how AI-driven network management systems analyze real-time data to optimize bandwidth allocation and deliver personalized content and services, thereby improving customer engagement and loyalty.

As GenAI adoption grows, telcos have another chance to capture value in the evolving digital landscape. A recent consumer survey conducted by Omdia reveals that 75% of consumers now use GenAI services like ChatGPT, representing an 8 percentage point increase from 2024. This growing user base could create new revenue pathways for telcos.

The most immediate opportunity lies in bundling premium GenAI applications with 5G and broadband services. While 37% of consumers remain satisfied with free versions of GenAI tools, this represents a substantial addressable market for telcos to convert through service bundling. An additional 20% of respondents express interest in premium applications, though 7% perceive pricing as too high, a barrier that telcos can overcome by absorbing costs and positioning premium AI access as a value-added service rather than a standalone purchase. The integration of premium GenAI services creates natural upselling opportunities, allowing telcos to migrate customers from basic to premium tiers.

MI^3 2026 illustrates mobile and AI converged development

Motivation and objective

As noted above, AI is driving a historic surge in capex and transforming the world's technological and economic landscape. The telecom industry is embracing the transformation, investing in AI-related infrastructure, and developing connectivity and AI-integrated services. Integrating connectivity and AI is creating a new way to build an intelligent society, enabling a more substantial and sustainable approach to the AI era.

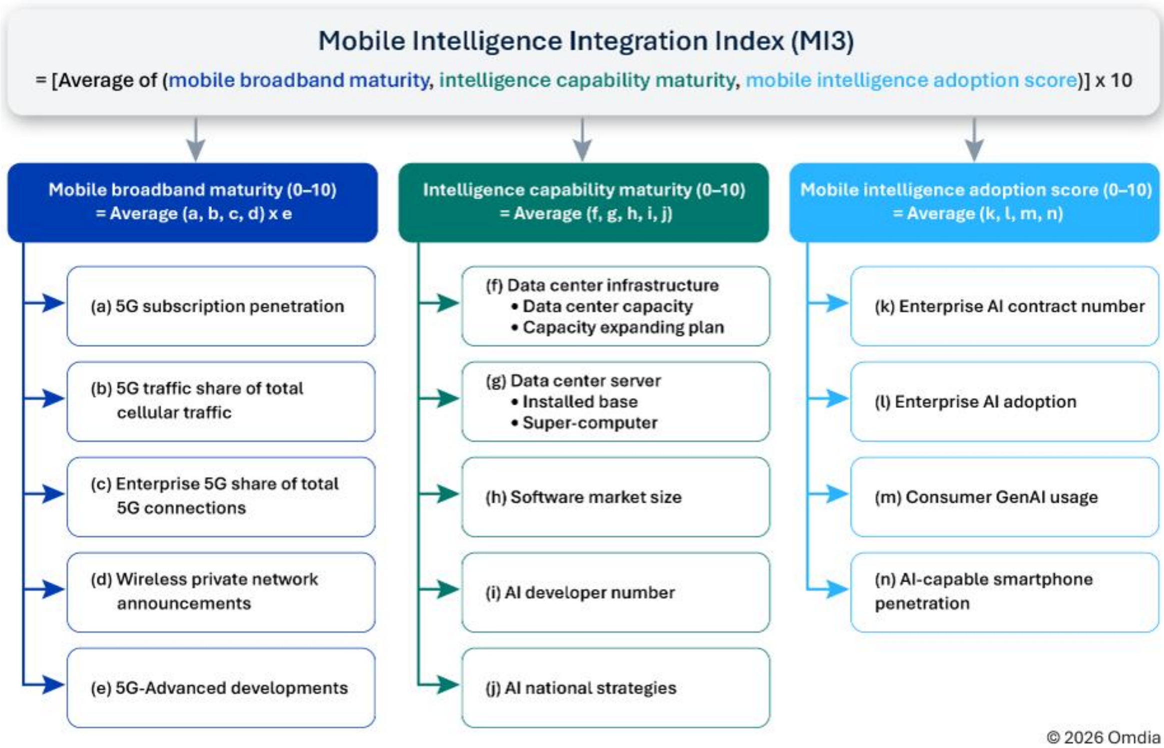
At Mobile World Congress Shanghai (MWC Shanghai) 2025, GTI Alliance and Omdia jointly published the MI^3 2025 to help the telecom industry understand the maturity and readiness of both mobile broadband and AI computing ecosystems and decide their business and technology strategies for integrating mobile broadband and AI.

Since MWC Shanghai 2025, the integration of mobile broadband and AI has achieved significant progress. Mobile and AI converged applications are increasingly available in the market, affecting global technological and economic development. Therefore, GTI Alliance and Omdia jointly updated the MI^3 to evaluate each country's progress of mobile and AI convergence and to support decision-making by industry players and relevant stakeholders.

Methodology

MI^3 2026 retains the mobile broadband maturity and intelligence capability maturity perspectives from MI^3 2025, with minor updates. These two metrics form the foundation for countries to develop mobile and AI-converged applications, leveraging connectivity and intelligent computing ecosystems. Meanwhile, MI^3 2026 replaces the qualitative mobile broadband and intelligence convergence score from MI^3 2025 with a quantitative mobile intelligence adoption score to reflect progress in integrating connectivity and AI applications. **Figure 3** shows the MI^3 2026 model.

Figure 3: MI³ 2026 modeling approach



Source: GTI Alliance and Omdia

According to this model, each country's progress in mobile AI convergence will be evaluated using 14 sub-metrics. The model metrics are described in **Table 1**.

Table 1: MI³ 2026 methodology

Metric	Sub-metric	Score range
Mobile broadband maturity score = Average (a, b, c, d) x e	(a) 5G subscription penetration	0–10
	(b) 5G traffic share of total cellular traffic	0–10
	(c) Enterprise 5G share of total 5G connections	0–10
	(d) Number of wireless private network announcements	0–10
	(e) 5G-Advanced factor: If 5G-Advanced is deployed, an adjustment factor is given	110% or 100%
Intelligence capability	(f) Data center	0–10

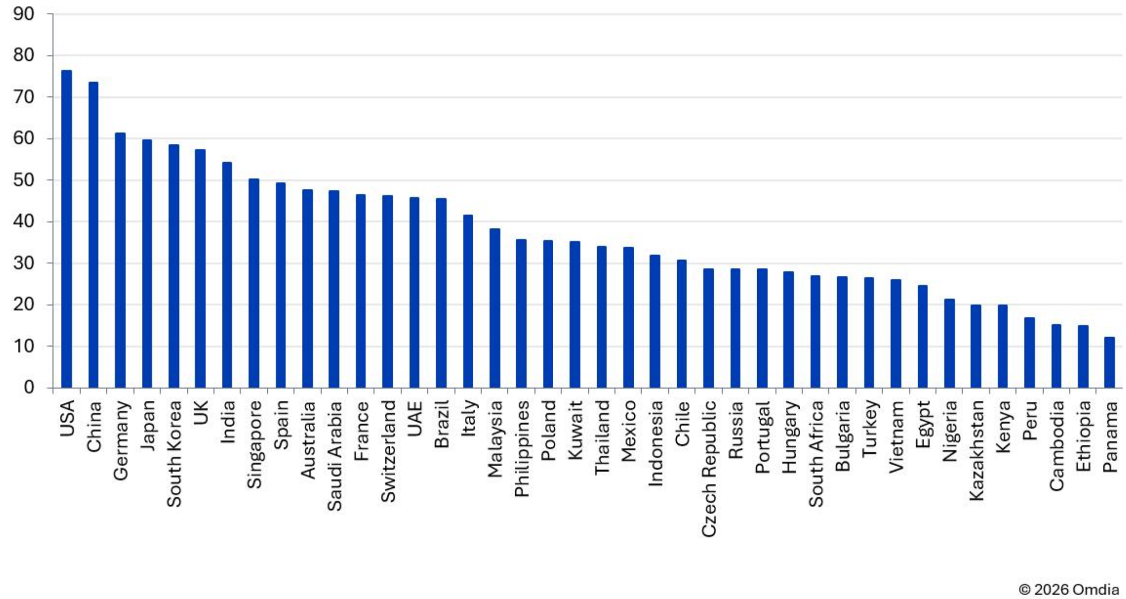
maturity score = Average (f, g, h, i, j)	infrastructure: Based on data center capacity and expansion roadmap	
	(g) Data center server: Based on server installed base and super-computer capacity	0–10
	(h) Enterprise software market size	0–10
	(i) AI developer: Based on the number of AI developers contributing to GitHub	0–10
	(j) AI strategies: Based on a country's strategies on AI or GenAI	0–10
Mobile intelligence adoption score = Average (k, l, m, n)	(k) Enterprise new AI contract number	0–10
	(l) Enterprise AI adoption rate	0–10
	(m) Consumers' interest in using GenAI on smartphones	0–10
	(n) AI-capable smartphone shares in total smartphone shipment	0–10
Final score = 10 x Average of (1), (2), and (3)		

Source: GTI Alliance and Omdia

Ranking

Based on the MI^3 2026 model, we studied and benchmarked 40 countries from Africa, the Americas, Asia & Oceania, Europe, and the Middle East. The 40 countries represent approximately 5.85 billion people, roughly 70.5% of the world's total population. **Figure 4** shows their rankings.

Figure 4: MI³ ranking



Source: GTI Alliance and Omdia

The 40 countries can be categorized into five groups based on their scores and positions within the MI³ model. **Table 2** summarizes the categorization.

Table 2: Country categorization based on MI³ modeling

Group	**Countries**	**Score range**	**Mobile AI integration**
Super power	US, China	> 70	Significantly ahead of other countries in terms of mobile AI integration
Leaders	Germany, UK, Japan, South Korea, India	54–62	Behind the superpowers while leading other countries and ready to accelerate mobile AI integration
Regional powers	Singapore, Spain, Australia, Saudi Arabia, France, Switzerland, UAE, Brazil, Italy	41–51	Ahead of most countries in their respective regions and ready to accelerate mobile AI integration

Followers	Malaysia, Philippines, Poland, Kuwait, Thailand, Mexico, Indonesia, Chile, Czech Republic, Russia, Portugal, Hungary, South Africa, Bulgaria, Turkey, Vietnam, Egypt	24–39	Demonstrating the potential of mobile AI integration
Immatures	Nigeria, Kazakhstan, Kenya, Peru, Cambodia, Ethiopia, Panama	11–22	Falling behind in almost all areas of mobile AI integration and too immature to promote the integration

Source: GTI Alliance and Omdia

Key findings

- **The gap between developed and developing countries is still significant.**

Comparing the highest and lowest MI³ rankings reveals significant gaps between developed and developing countries, both in the final score and in each metric's score.

Table 3: Gaps between developed and developing countries in MI³ ranking

Metric	**Highest/lowest**
Mobile broadband maturity	699%
Intelligence capability maturity	2589%
Mobile intelligence adoption	311%
Final score	1108%

Source: GTI Alliance and Omdia

As mobile intelligence adoption is still in its early stages, the ecosystem has not yet fully developed, even in advanced markets. Therefore, the gap between developed and developing markets in this area is still modest.

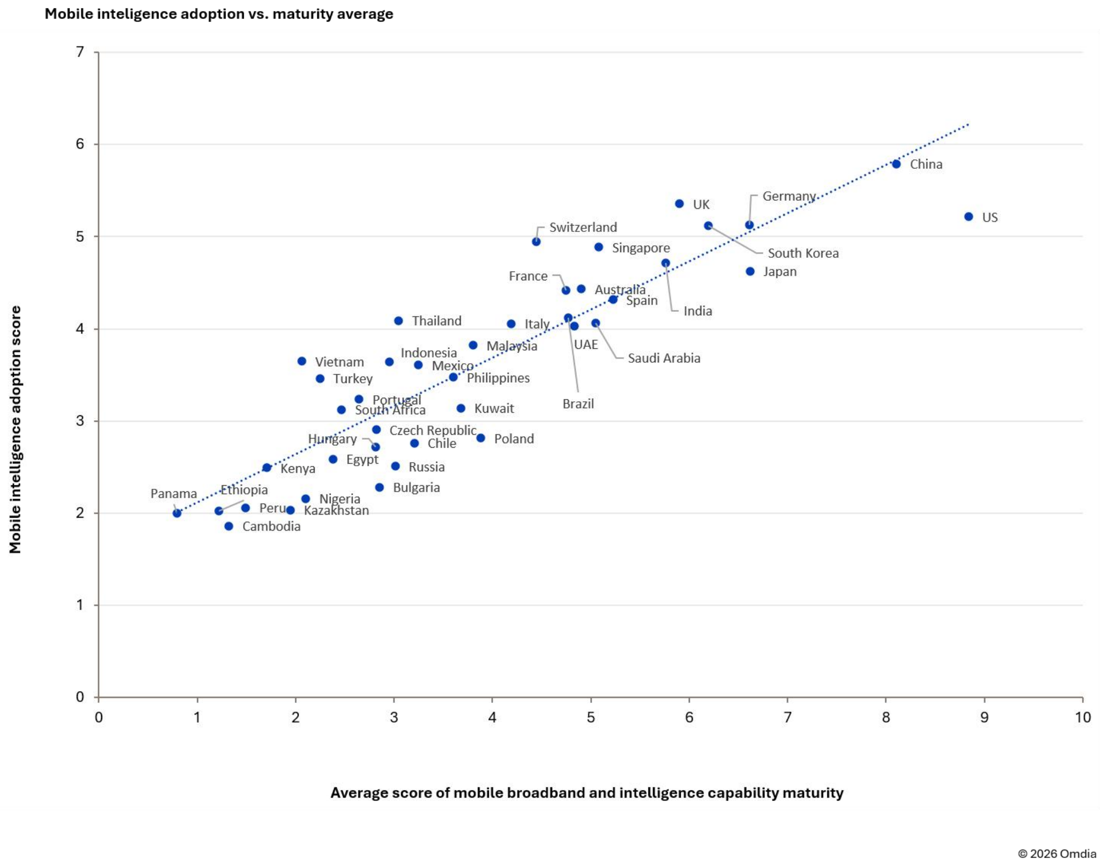
However, in the more foundational areas, namely mobile broadband and intelligence capability maturities, the gaps are considerably wider. In particular, the intelligence capability maturity score reveals more than a 25-fold difference , aligning with developed countries' aggressive investments in computing infrastructure.

- **Mobile intelligence adoption is significantly relevant to infrastructure and capability maturity.**

The modest gap in mobile intelligence adoption and the extensive gap in mobile broadband and intelligence capability maturity indicate opportunities and challenges for developing countries in the AI era.

Mobile AI convergence could be a great opportunity for them to upgrade their economies. MI³ results indicate that mobile intelligence adoption is significantly related to mobile broadband and intelligence capability maturity, as shown in **Figure 5**. The less developed infrastructure and developer ecosystem will limit their potential to benefit from advanced technologies.

Figure 5: Significant relevance between mobile intelligence adoption and infrastructure and capability maturity



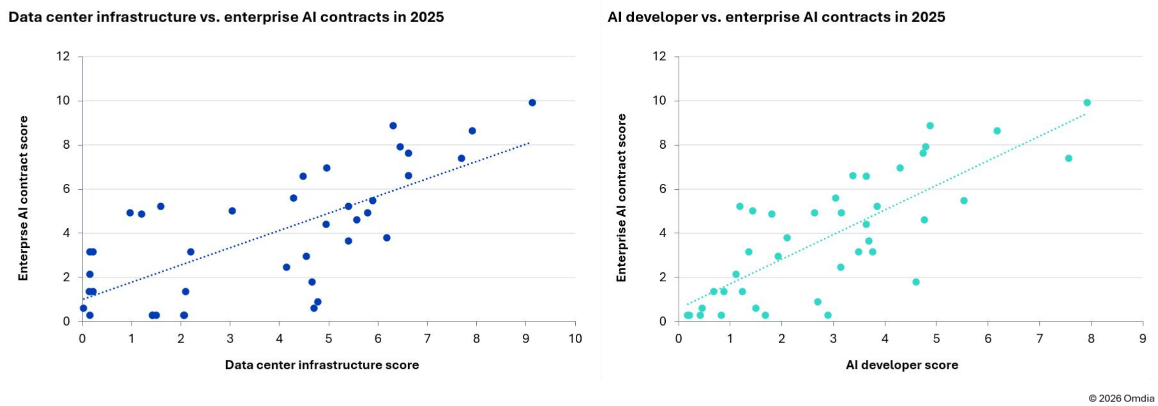
Source: GTI Alliance and Omdia

In this case, supportive industry policies and industry leading companies' backing could play a key role in helping developing countries narrow the gap and seize opportunities in AI development. Growing markets in developing countries could, in turn, expand the total addressable market for industry leaders, creating a win-win partnership.

- **Both hardware infrastructure and the software developer ecosystem affect AI adoption in enterprise markets.**

Further analysis of enterprise AI adoption indicates that it is relevant to both hardware infrastructure and the software developer ecosystem. Clear relevance can be seen between data center infrastructure and enterprise AI contracts, as well as between AI developer numbers and enterprise AI contracts (**Figure 6**).

Figure 6: Enterprise AI application development is relevant to both infrastructure and the developer ecosystem



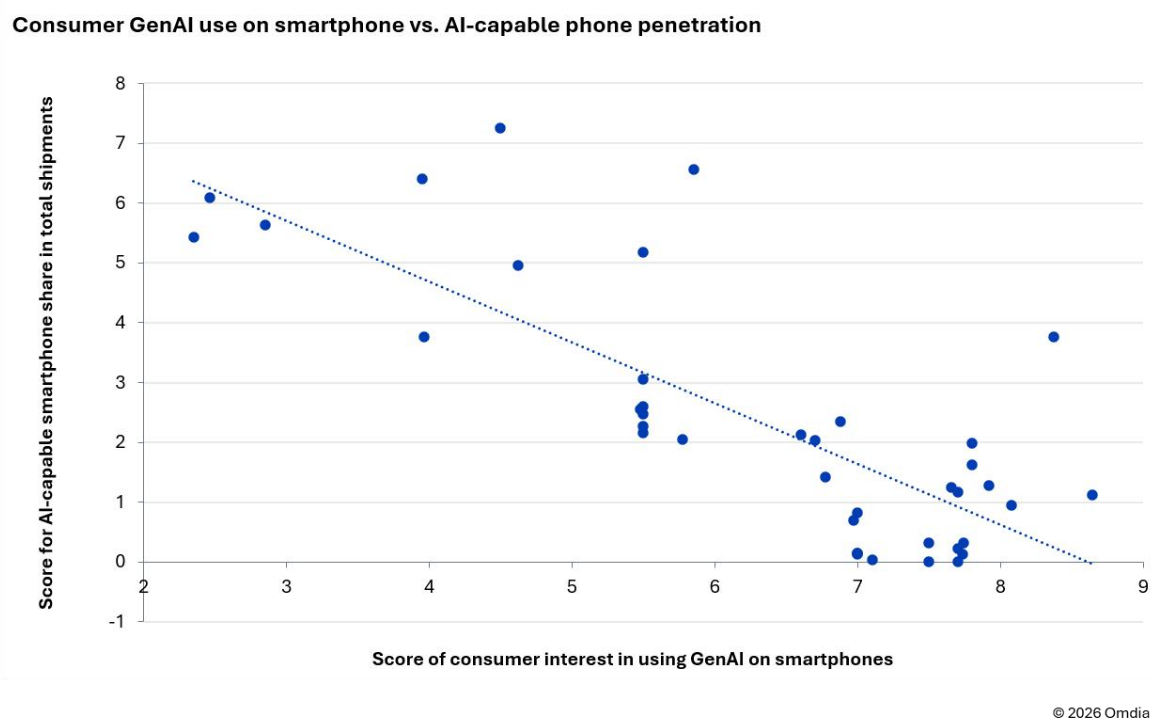
Source: GTI Alliance and Omdia

Therefore, countries that want to accelerate enterprise AI adoption should not only invest in the hardware infrastructure, such as AI data centers and broadband connectivity, but also encourage the building and expansion of an AI developer community, particularly promoting open-source community development, to improve accessibility, accelerate innovation, and realize customization and data sovereignty.

- **Mobile broadband connectivity is critical for consumer AI adoption.**

The analysis for AI adoption in consumer markets indicates that, in less-developed countries, consumers rely more on smartphones to access AI applications. However, in less-developed countries, the penetration of high-end smartphones with AI computing capabilities and sufficient memory is often lower. This creates a dilemma: in markets with higher demand for AI applications on smartphones, consumers often have fewer opportunities to access capable smartphones, leading to poor user experience and hindering the proliferation of AI applications in these markets.

Figure 7: Consumer GenAI use on smartphone vs. AI-capable phone penetration



Source: GTI Alliance and Omdia

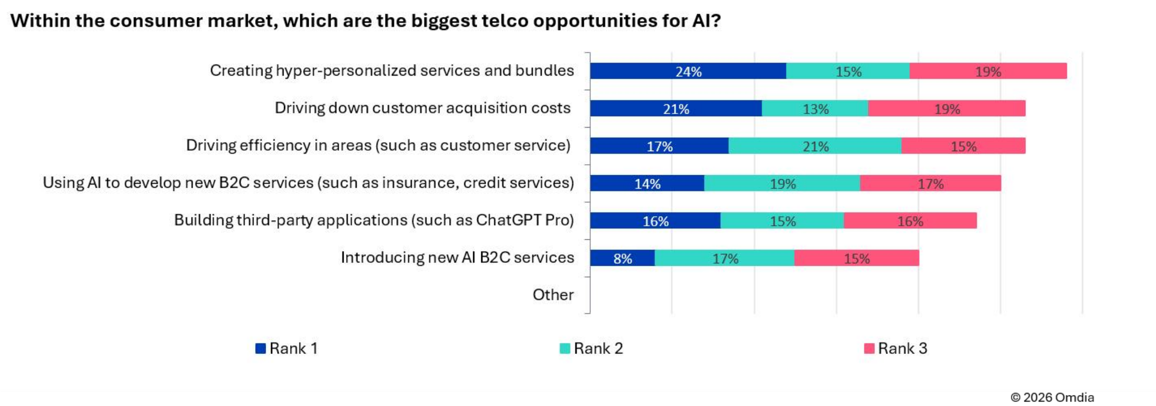
In this case, mobile broadband connectivity can enable distributed AI workloads between user devices and networks, reducing demand for high-end user devices and improving the accessibility and affordability of AI applications for mass consumers. Therefore, mobile broadband will play a crucial role in accelerating AI proliferation and promoting consumer AI applications, particularly in developing countries. Enhancing broadband connectivity could be the first step for immature countries to promote AI development. Friendly regulatory policies, such as allocating more spectrum for mobile services and improving infrastructure for telecom sites, could help the industry expand broadband connectivity efficiently.

- **5G-Advanced helps telcos develop integrated mobile and AI services.**

MI^3 2026 indicates that 5G-Advanced has been spreading across the global market. Compared with four out of 28 countries in MI^3 2025, 11 out of 40 countries have deployed 5G-Advanced networks in MI^3 2026. Enhanced access performance of 5G-Advanced networks can help telcos achieve comprehensive integration between mobile and AI capabilities.

In a service provider survey conducted by Omdia in 2025, telco executives voted "creating hyper-personalized services and bundles" as the lead opportunity for AI in the consumer market. Operators are slowly but increasingly leveraging AI and data analytics to deliver tailored offers to consumers, such as stadium-goers and social media influencers. An example is China Mobile's football fan-exclusive package in Shanghai, which includes 5G-Advanced network acceleration. AI-driven network management systems analyze real-time network and consumer usage data in the stadium during a football match to optimize bandwidth allocation, reduce latency, and ensure a seamless, high-speed connection for fans using the package.

Figure 8: Hyper-personalized services and bundles as the lead opportunity for AI in the consumer market



Source: Omdia

To deliver tailored services, the radio access network (RAN) must be flexible and provide sufficient capacity margin to meet dynamic demand. 5G-Advanced can provide telcos with improved capacity to explore hyper-personalized service opportunities without constraints imposed by radio network performance. In particular, the enhanced uplink performance of 5G-Advanced can better support real-time data exchange between devices and the cloud for multimodal and embodied AI models, thereby building a connectivity foundation for advanced AI applications.

Today, the global mobile industry is standardizing 6G technologies. As the first AI-native mobile communication system, 6G is expected to meet the demand for AI services from day one and achieve true mobile intelligence integration by embedding AI models and algorithms into the system to further improve performance.

Outlook and recommendations

Tokenomics and token-centric business models are emerging

As discussed at the beginning of the paper, the emergence of agentic AI systems is fundamentally reshaping how AI delivers value. Agentic AI systems can generate and execute program code while coordinating multiple external tools to significantly improve the automation across work, daily life, and entire economic activities, driving the transition to an AI-centric economy.

GenAI models are the foundation of agentic AI systems. In GenAI, tokens are the basic units of texts, words, or fragments that AI models like ChatGPT or Anthropic Claude process. Every interaction with AI models consumes tokens, and AI model providers usually charge customers based on the volume of tokens used. Tokens act as the standardized unit of transaction and pricing of AI-centric economics.

To build scalable, profitable AI products, developers and organizations use tokenomics modeling to minimize token usage while maximizing performance. On the other hand, AI model providers stimulate token usage growth by developing more advanced, token-intensive models and monetizing through tokenomics.

Tokenomics can create new business opportunities for telecom operators. Telcos can integrate their broadband and cloud infrastructures to provide integrated connectivity and computing AI services, charging per unit of tokens. To date, all major Chinese telcos have provided token-centric service plans to enterprise and consumer clients, particularly to support the agentic AI use cases. For example, China Mobile Beijing Branch provides a token-based add-on package for its customers. For Y24.99 per month, a client can get a monthly quota of 10 million tokens for their AI applications. In contrast, a basic customer service AI agent would consume 10,000–50,000 tokens per day, and in complex scenarios, up to 500,000 tokens per day. With the token-based service package, the customer can access both connectivity and AI computing services through a single portal and a single bill, simplifying access and improving the experience.

Furthermore, China Mobile launched its Mobile Model Management (MoMA) Platform in May 2026 to serve as a unified gateway bridging the gap between complex AI model development and practical industry applications. The MoMA platform is an ecosystem-level orchestration platform that integrates more than 300 mainstream AI models in the Chinese market, built on a service philosophy described by China Mobile as “One-time access, intelligent selection, universally availability and affordability, safe and trustworthy.”

The MoMA platform can automatically analyze a user's request and match the most suitable AI models to the user's task based on requirements for inference quality, processing latency, and costs, ensuring a balanced experience and cost. Meanwhile, by using a self-developed inference engine optimized for domestic hardware, China Mobile claims that its MoMA platform can reduce the cost per token by around 30%.

As previously discussed, leading global telcos, such as Deutsche Telekom, Orange, SK Telecom, and SoftBank, are transforming their B2B and B2C services into AI-centric models by providing GPUaaS, bundling AI applications with traditional services, and offering hyper-personalized services. In all these models, tokens can be a standardized unit of transaction and pricing. Token-centric business models can help telcos to better meet customer demand for AI services, monetize their connectivity and computing infrastructure, and move toward an AI-centric business and organization. In addition to Chinese operators, pioneering operators in India and the US, such as Reliance Jio and T-Mobile, are also planning to launch their token-based services. Therefore, we expect token-centric business models to be broadly adopted by global telecom operators and to play a critical role in telcos' strategic transformations.

Recommendations for industry

- **Telcos: Transforming to a token-centric business model with extensive partnerships and innovations**

As previously discussed, a token-centric business could be a new opportunity for telcos to meet customer demand and monetize their infrastructure. However, competitiveness in AI markets largely depends on advanced AI models and rapid service development capabilities. Unfortunately, most telcos lack these capabilities, hindering them from capitalizing on token-centric business opportunities.

Therefore, telcos should strengthen their investments in in-house technical capabilities and in recruiting AI talent. Meanwhile, extensive partnerships or mergers and acquisitions could be an effective way for telcos to leverage their customer base or financial strength to enhance their AI capabilities quickly.

In consumer markets, AI-native devices could be a good entry point for telcos to drive consumer adoption of token-based services and access to telco-operated AI model platforms. Deutsche Telekom's AI Phone Pro and SoftBank's Natural AI Phone are early examples of this approach. We expect more telcos to explore consumer AI business opportunities through innovative devices.

- **Vendors: Prioritizing AI demand and AI-based solutions in next-generation infrastructure**

As discussed at the beginning of the paper, the global ICT infrastructure landscape underwent a historic transformation, and 2025 marked the first time Big Tech overtook traditional telecom operators in both revenue and investment. This transformation will influence telecom vendors' business models in three key ways.

First, vendors must continuously improve network performance to meet the growing data traffic driven by AI applications. This includes developing ultra-high-speed optical communication networks to connect AI data centers or enhancing 5G uplink performance to support multimodal mobile AI applications.

Second, vendors can enter the computing infrastructure market to capitalize on surging AI infrastructure investment, for instance, by developing optical communication modules for AI data centers or deploying a GPU-based AI-RAN solution to enable edge AI inference services.

Third, AI models and algorithms will play a critical role in next-generation communication systems, such as 6G. Therefore, vendors should strengthen their in-house R&D capabilities to integrate AI models and algorithms into their next-generation solutions.

Recommendations for regulators and authorities

As discussed earlier, the gap in mobile AI development remains significant between developed and developing countries, and mobile intelligence adoption is closely tied to infrastructure maturity, including hardware infrastructure and software ecosystems.

In developing markets, consumers tend to have greater demand for AI applications on smartphones. However, they often lack access to AI-capable smartphones and must rely on lower-end devices, leading to poor experiences and hindering the proliferation of AI applications in these markets.

Therefore, regulators and industry authorities should take a proactive approach to fostering the development of mobile AI ecosystems.

Enhancing broadband connectivity could be the first step for immature countries to promote AI development, as mobile broadband connectivity can enable distributed AI workloads between user devices and networks, reducing the need for high-end user devices and improving the accessibility and affordability of AI applications for mass consumers. Friendly regulatory policies, such as allocating more spectrum for mobile services and improving infrastructure for telecom sites, could help the industry expand broadband connectivity and bridge the digital divide efficiently.

Regarding AI computing and applications, beyond hardware infrastructure, such as AI data centers, regulators should also focus on the software ecosystem. Open-source AI models play a crucial role in improving accessibility, accelerating innovation, and realizing customization and data sovereignty. A country's industry authorities could promote the use of open-source AI models in the public sector and encourage the adoption of open-source software across the nation's economy and society through targeted funding, certification programs, professional credentials, and clear intellectual property guidelines. These measures will eventually boost the local open-source community and build a solid foundation for the long-term development of the local AI ecosystem.

Talent development is critical for a country's open-source community and entire AI ecosystem. Governments should invest in STEM education while equally emphasizing critical thinking, creativity, and emotional intelligence, and set up lifelong learning programs to provide accessible reskilling and upskilling opportunities for workers whose jobs may be displaced or transformed by automation. Through public-private partnerships, a bridge between educational institutions and industry needs could be established to ensure training programs align with emerging job requirements.

In all these areas, leading countries and industry players can join forces to help less developed countries. The global telecom industry can leverage its experience in narrowing the digital divide to help less-developed countries integrate AI capabilities into their economies and societies. Global industry organizations like GTI Alliance could become an important international collaboration platform where leading countries and industry players help less-developed countries narrow the gap in advanced technology.

Appendix

Methodology

This report draws on publicly available information and data as well as on proprietary data and analysis of **Omdia** and **GTI** Alliance.