

Where AI sits in telecoms today - the governance challenges and how governments can build safeguards.

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Agenda

1. **Telecom sector as an example of where AI governance meets reality**
2. **Where AI actually sits in telecoms today**
3. **The governance challenges**
4. **How governments can respond**

Telecom sector as an example of where AI governance meets reality

Telecom operators sit at an unusual intersection:

- *Telecoms are deployers of AI at scale, are already heavily regulated critical national infrastructure, and increasingly becoming providers of national AI capacity.*
- *Governance questions need to be addressed before going live with systems that affect traffic from millions of users.*
- *And any AI governance requirements will need to work with an existing stack covering licensing, spectrum, lawful interception, data protection and consumer rights etc...*



Deployer of AI at scale

AI is operating in live networks today — optimisation, automation, fraud detection, customer care.



Critical national infrastructure

Named in EU AI Act Annex III(2); already regulated on licensing, security and consumer protection.



Provider of AI capacity

Data centres, compute and data-residency environments increasingly underpin national AI ambitions.

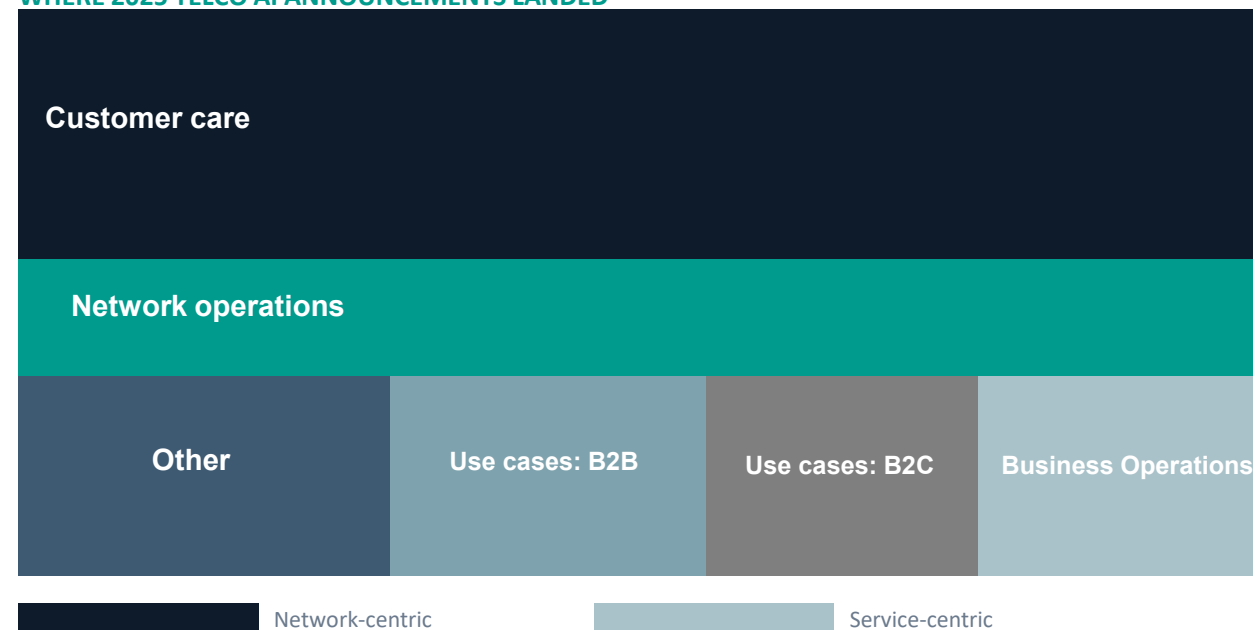
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Telco AI today is overwhelmingly internal

Operators put AI to work across many areas, Network operations and customer care dominated 2025 launches; revenue-generating AI remained a minor focus.

WHERE 2025 TELCO AI ANNOUNCEMENTS LANDED



Blocks are indicative of share of announcements, not scale of implementation.

WHAT GSMA INTELLIGENCE CONCLUDES

The breadth of telco AI

Announcements span customer care, internal operations, network operations, data-centre builds and AI-centric services for B2B and B2C users.

Internal versus external

Network, care and operations use cases are generally inward focused. New services and data-centre builds aim to engage customers.

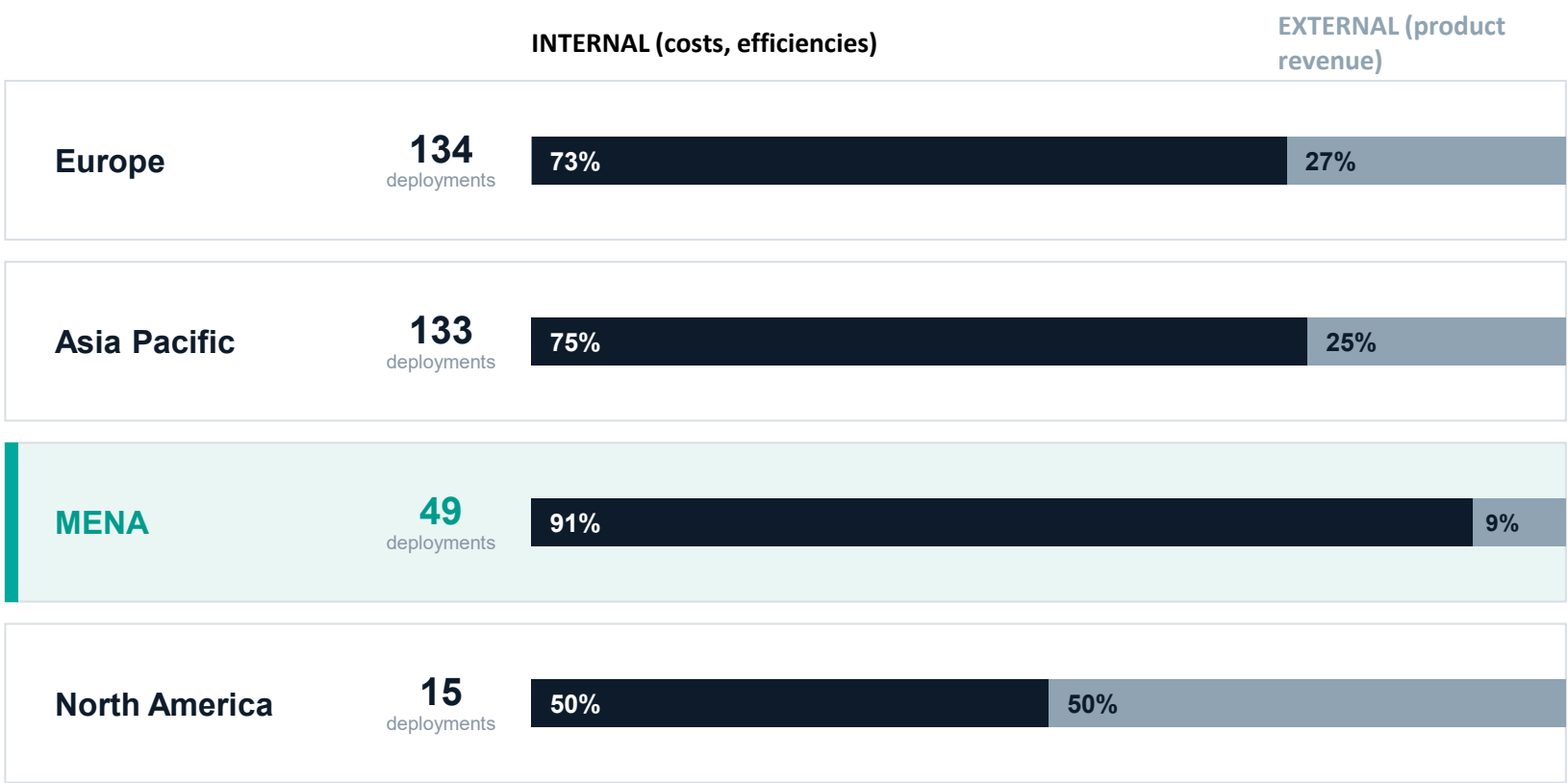
Revenue aspirations remain challenging

While user-facing services and investment were announced in 2025, most operator activity was internal in nature and less focused on new revenues.

Efficiency is proven; revenue is the open question

Telco AI deployments remain mostly about efficiencies, but revenue is firmly in play - and the regional split is stark. MENA is the most internally focused region measured.

AI DEPLOYMENTS AND THEIR OBJECTIVE, BY REGION — SIX MONTHS TO DECEMBER 2025



The direction of travel is clear

Of telco AI deployments launched in the six months to December 2025, 25–50% are there to drive revenues — against 10–15% a year earlier.

The MENA position

91% internal. The region has real deployment volume — 49 launches — but the least externally focused profile measured. Governance clarity is part of what unlocks the other 9%.

Source: GSMA Intelligence, in Global Mobile Trends 2026, p.21 ('Monetisation waits for no one, with AI no exception'). Percentages are the internal/external split of new deployments.

The shift now under way: from advising to acting

Agentic AI - systems that act rather than recommend - is being planned across core processes. Deployment is early, but planning is broad, and it concentrates where AI meets customers.

IN WHICH PROCESSES HAVE YOU STARTED TO PLAN AGENTIC AI? (% of operators)



Planning is broad

The three most advanced areas — fraud, customer service and network optimisation — are precisely where AI decisions reach customers and critical infrastructure.

But deployment is early

More than two thirds of operators have not progressed past Level 2 autonomy — partial, domain-specific and largely reactive. **Most target Level 4 by 2030.**

Sources: GSMA Intelligence Operators in Focus Service Assurance Operator Survey 2025 (p.35); GSMA Intelligence operator progress on autonomy (p.32), in Global Mobile Trends 2026.

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Six governance challenges from the telecoms frontline

frictions the sector is encountering as AI moves from pilots into live networks and customer-facing services.



Regulatory fragmentation

01

AI rules layer onto data protection, cybersecurity, specific sector laws, with duties differing across borders.



Classification ambiguity

02

AI Act Annex III covers critical digital infrastructure - but where routine network optimisation sits within that scope is not self-evident.



Accountability across the value chain

03

Operators deploy third-party models. The Act allocates duties along the chain, but applying them in practice is complex.



Data governance and cross-border flows

04

Residency rules and differing consent regimes complicate model training and regional AI services.



AI-specific security exposure

05

Operators already report a wide gap between perceived threat and readiness. AI adds new threat classes on top.



Pace mismatch

06

Agentic AI planning is broad while deployment is early - and policy making cycles are slower than both.

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Safeguards without uncertainty: six design principles

Accountability and investment certainty are not in tension , provided rules are precisely scoped, predictable and interoperable.



01 Regulate the use, not the technology

Tier obligations by application risk. The EU has demonstrated this is workable.



02 Publish clear definitions and timelines

Ambiguity is itself a cost. Precise scope and transition periods let capital commit.



03 Align to international instruments

The OECD definition is already used by the EU, Council of Europe and UN. Alignment is available.



04 Allocate duties to whoever controls the risk

Map responsibility across developer, deployer and integrator so no party over-hedges.



05 Use sandboxes and recognise standards

Test novel AI under supervision; recognise published sectoral frameworks as evidence.



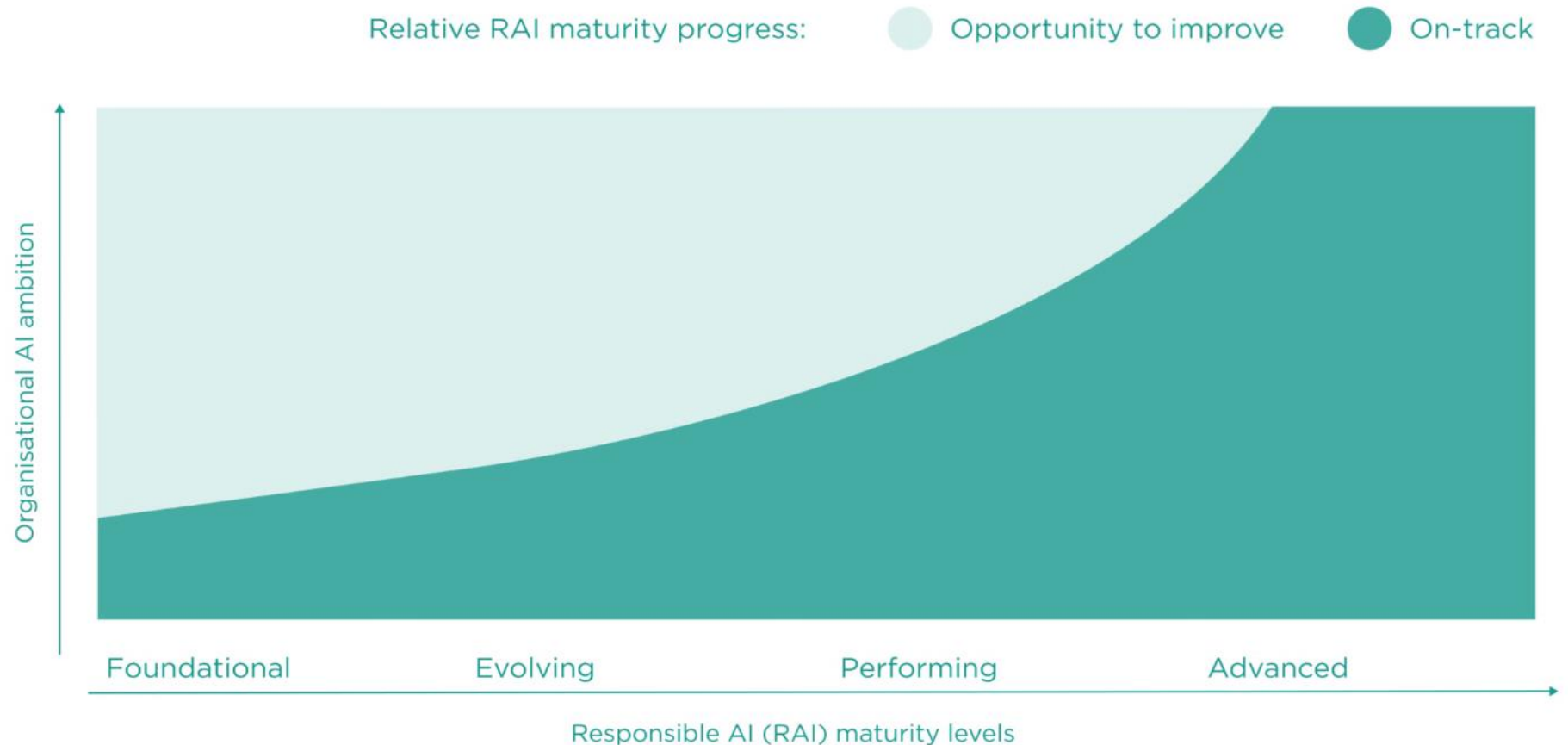
06 Bring the private sector to the table

Multi-stakeholder design produces rules that are enforceable in practice.

The GSMA Responsible AI Maturity Roadmap

Published September 2024.
Five dimensions and 20 sub-dimensions, assessed across four maturity levels, with a public self-assessment tool. The roadmap provides a structured framework to assist operators in evaluating and enhancing their practices,

The bigger the AI ambition an organization has, the higher the level of Responsible AI maturity that should be implemented. The roadmap is relevant at any stage of AI adoption.



Source: *The GSMA Responsible AI Maturity Roadmap, GSMA, September 2024.*

Six practical steps for the Arab States



Adopt proportionate, risk-based rules

1

Concentrate oversight where risk to rights and safety is real — not on routine network engineering.



Anchor to international instruments

2

Align to the OECD definition and UNESCO principles for cross-border interoperability and investor confidence.



Pair sovereign AI with sovereign governance

3

National compute ambitions need matching accountability, oversight and security frameworks.



Recognise telcos as strategic national assets

4

Include operators in AI governance design; treat trusted network infrastructure as AI infrastructure.



Calibrate oversight to autonomy

5

Tie the human-oversight duty to a published autonomy level rather than a blanket requirement.



Unlock the external 9%

6

Regulatory clarity is part of what moves regional AI from internal efficiency to customer-facing value.

Thank you

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