



# AI in Telecom: Control, Scale & Competitiveness



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AI is now everywhere in Asia Pacific telecom, in customer service, product development, operations, security, and increasingly the network itself, through OSS, BSS, and network management.

The deeper it goes, the more it runs into questions of regulation, sovereignty, and who actually controls the infrastructure underneath it.

**Here are 5 trends shaping Asia Pacific's telecom industry.**





# 1. AI is Moving Across the Telecom Stack

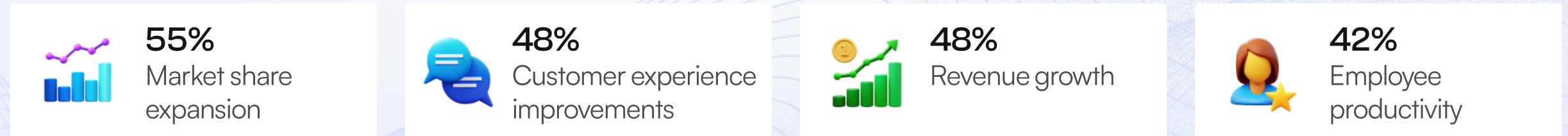
AI adoption clusters around network intelligence, digital services, and customer experience.

## MOST POPULAR AI USE CASES IN TELECOM



Operators are using AI to strengthen competitive position, not just cut costs.

## TOP BUSINESS OUTCOMES EXPECTED FROM AI ADOPTION



## 2. AI Enters the Core

Some telecom providers are moving beyond AI-assisted network operations to AI making decisions within them.

### Network and BSS automation

[SK Telecom](#), [Rakuten Mobile](#), and [LG Uplus](#) are embedding AI into OSS, digital BSS, and programmable network functions

### Enterprise workflows

[Singtel is rolling AI across operational workflows](#) and enterprise systems

### Agentic AI

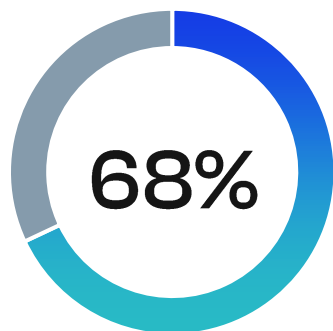
[One NZ is trialling autonomous agents](#) on its voice core and OSS, while [Grameenphone is using agentic AI](#) to modernise legacy product catalogue processes



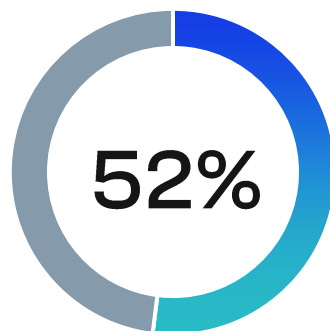
### 3. Regulation is the Brake

Regulation, not technology, is the biggest hurdle to AI adoption in telecom.

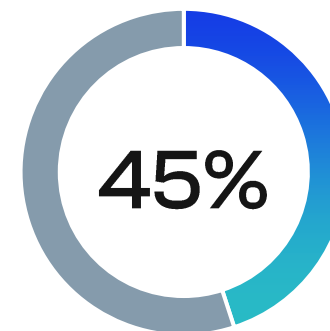
#### BIGGEST CHALLENGES TO AI ADOPTION IN TELECOM



Market-specific barriers



Lack of organisational alignment



Infrastructure limitations

Source: Ecosystem, 2026

Data sovereignty, localisation, and cross-border restrictions shape where AI can run and which providers can be used.



## 4. Sovereignty Moves into Infrastructure

Operators are responding to regulatory fragmentation by building sovereignty into their infrastructure itself.

### Cloud and AI

Malaysia, India, and South Korea are building domestic capability across cloud, satellite, and AI, reducing reliance on foreign technology

### Digital stack

Airtel Business and ITI are positioning a broader stack spanning connectivity, cloud, data centres, AI, IoT, satellite, and cybersecurity

### Connectivity resilience

Malaysia's SALAM cable, Indonesia's submarine cable efforts, and new routes like Echo are strengthening regional connectivity

## 5. Scale Becomes Strategic

Building AI-native, sovereign infrastructure demands heavy investment, pushing operators towards scale and partnerships.

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Singtel's planned USD 14 billion [merger with Indosat](#) would create Southeast Asia's largest mobile-broadband operator.

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Singtel is also considering [selling a minority stake in Optus](#), which could bring in fresh capital and expertise

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Indonesia's release of the 700MHz and 2.6GHz bands [links spectrum access directly to 4G and 5G](#) coverage commitments

# Ecosystem Opinion

Telecom operators are making AI choices alongside infrastructure, regulation, and network investment decisions; these factors affect one another. The advantage will come from being deliberate about what to own, what to share, and how much control to retain.

For more Ecosystem Insights, visit



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