

Perspective

Telco AI Readiness Index: 2026 results

Gorkem Yigit, Joseph Attwood and Caroline Gabriel

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Introduction

AI/ML, GenAI and agentic AI are redefining how telecoms networks are built, operated and monetised. They represent fundamental pillars of autonomous network transformation and are creating new revenue opportunities for operators in the AI economy. The journey to becoming truly AI-native is complex, spanning technology, data, organisation and commercial strategy, and operators are at very different stages of progress.

Measuring where operators stand on this journey, and why some are moving faster than others, is key to realising AI’s full potential in the industry. A holistic assessment of readiness helps the industry identify gaps, develop best practices, build actionable roadmaps and make investment decisions.

Analysys Mason, in partnership with Dell, conducted a study to understand operators’ strategies for AI adoption and measure their progress in preparing their technology, organisational and commercial capabilities to maximise AI opportunities both internally and for revenue-generating services. The results form our inaugural Telco AI Readiness Index, and this report presents the 2026 findings, based on a survey of 50 Tier 1 operators worldwide, conducted between March and May 2026.

Geography 		Job function 	
Western Europe	22%	CTO/CIO office	64%
Developed Asia–Pacific	18%	Head of network strategy	18%
Central and Eastern Europe	14%	Head of technology strategy	10%
North America	10%	Head of cloud strategy	6%
Emerging Asia–Pacific	10%	Head of RAN strategy	2%
Middle East and North Africa	8%		
Latin America	8%		
Sub-Saharan Africa	6%		
50 Tier 1 telecoms operators		50 Tier 1 telecoms operators	

Telco AI Readiness Index assesses the technical, organisational and commercial progress operators are making towards deploying AI



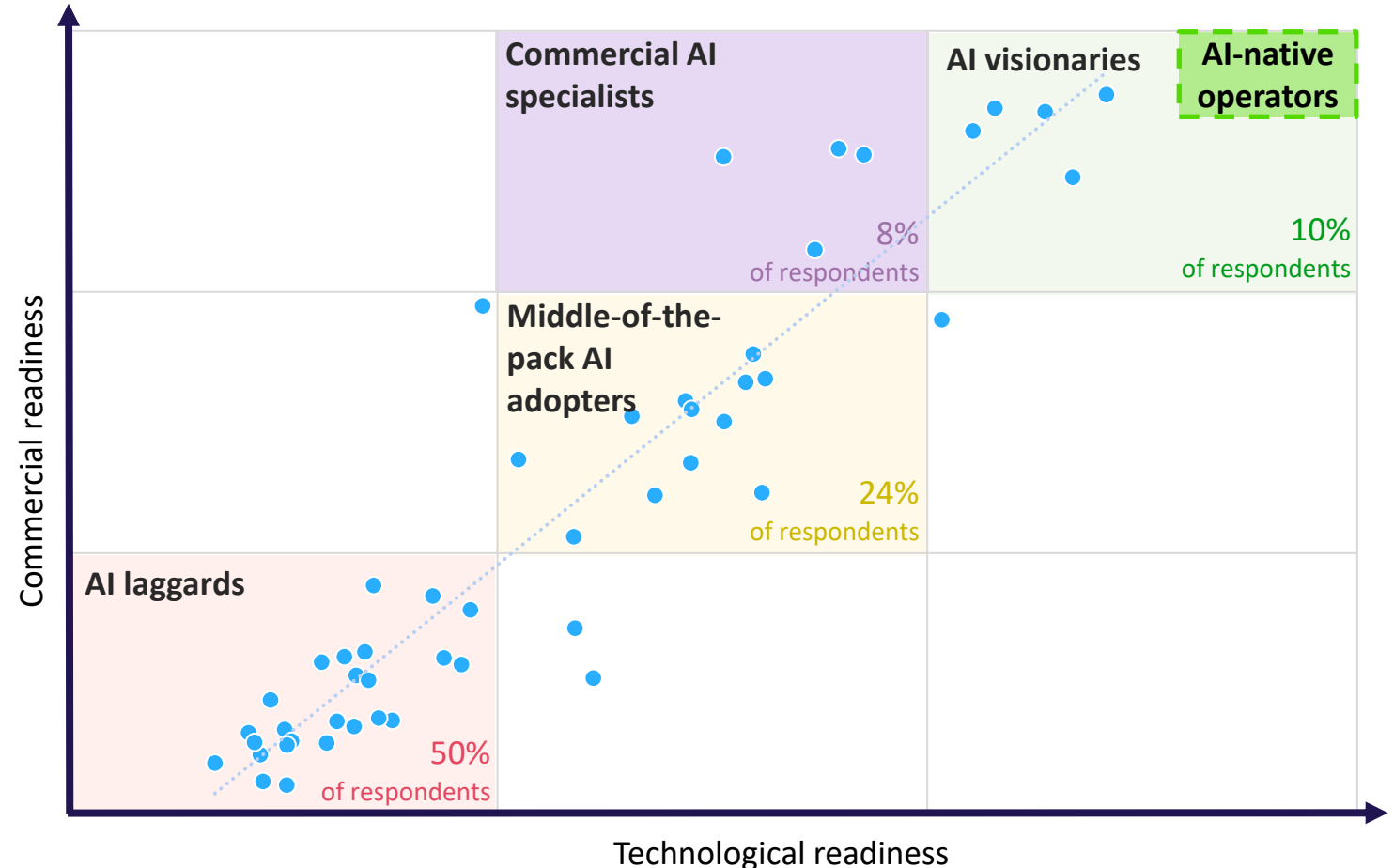
AI ambition is widespread in telecoms, but execution gaps and cloud-native progress separate the leaders from the rest

The 2026 results show an industry that is broadly committed to AI as a strategic priority. Real progress will require a balanced approach across technological, operational and commercial dimensions, as reflected in the leaders' progress and correlation patterns.

The main gaps today are in execution capabilities, spanning technology and toolset maturity, employee skillsets and organisational alignment, with a lack of ROI clarity emerging as a consequence. These gaps stem from structural constraints including legacy operating models and siloed organisational structures; fragmented data ownership across domains; closed architectures that limit openness and programmability; and a risk aversion that delays investment in AI.

The results reveal a strong link between the openness and cloud-nativeness of networks and AI readiness.¹ This confirms that operators that invested in open network transformation are better positioned to adopt AI at speed and scale.

Telco AI Readiness Index assessing technological and commercial readiness



¹ See slide 16 and Analysys Mason's [Open Network Index 2026](#).

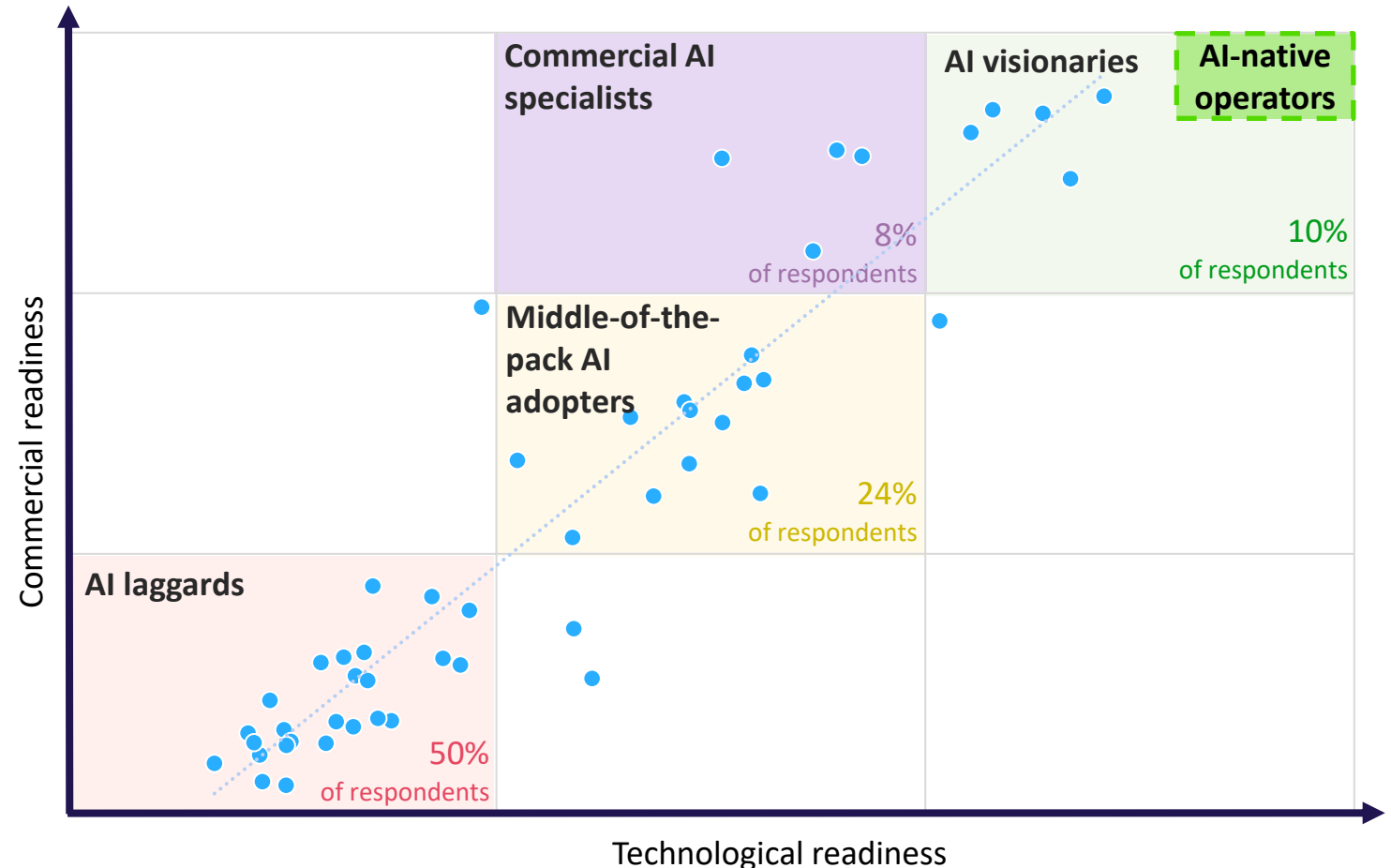
A small group of operators is pulling ahead on AI readiness, but 50% of operators are still laggards

The index results demonstrate that AI readiness is uneven across the operator base.

A small group of **AI visionaries** is leading the way towards AI-native operations, placing AI/ML, GenAI and agentic AI at the core of their networks and services from the ground up. They have strong data foundations, cross-functional alignment and open, cloud-native network capabilities that give them a structural advantage. At the other end, 50% of operators (**AI laggards**) remain at an early stage of their journey, lacking the right vision, strategy and data foundations to accelerate.

Commercial AI specialists are moving fast to tap into new AI service opportunities, but their technology platforms, operations and data have not kept pace. **Middle-of-the-pack AI adopters** are making steady progress, but risk aversion, a lack of strategic clarity, limited skillsets and internal capabilities, and ROI uncertainty are preventing them from moving at the pace of the leaders.

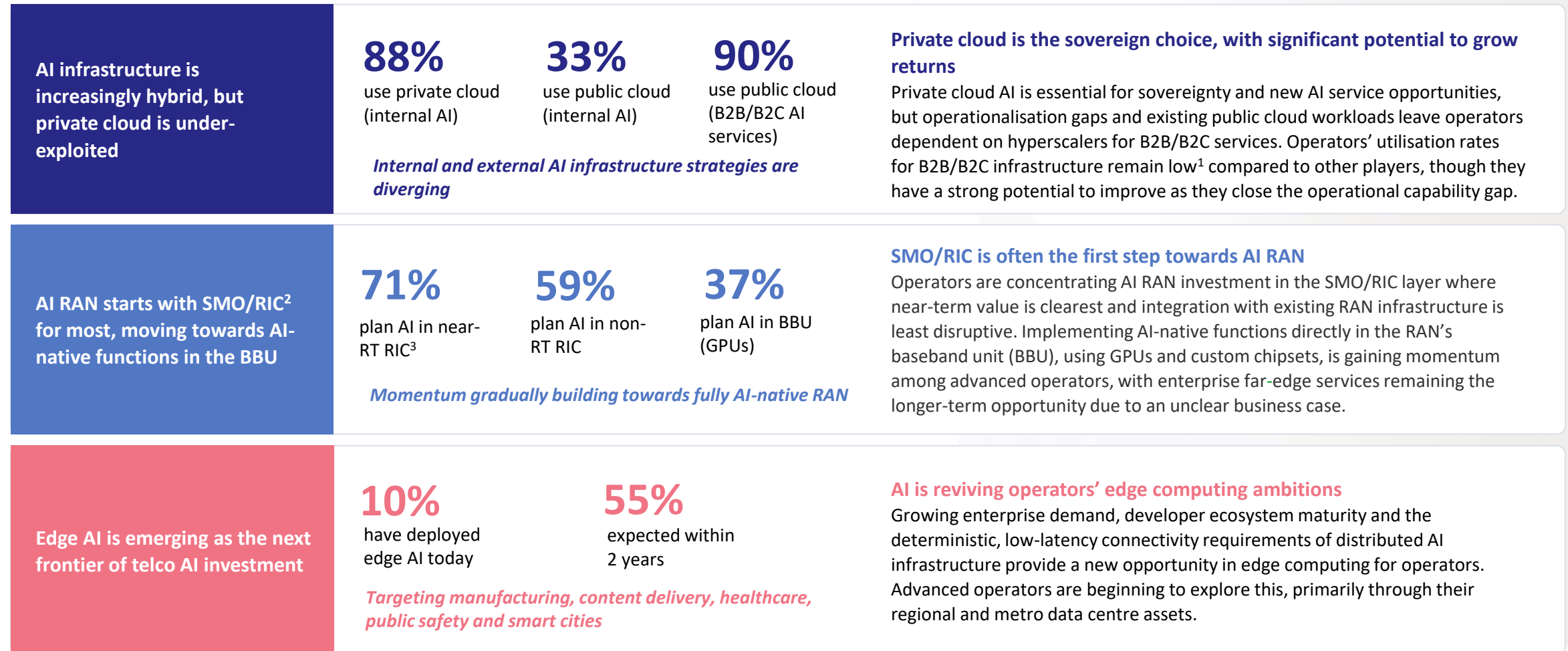
Telco AI Readiness Index assessing technological and commercial readiness



All operators are committed to AI but struggle to move from ambition to operationalisation at scale

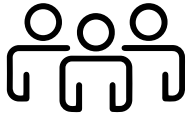
Most operators are yet to operationalise and scale AI in the network	24% Core network design and planning 29% RAN energy management 20% Offering AI-based services Expected progress within 2 years is highly ambitious	Big ambition, slow execution Many operators are struggling to move from trials and PoCs to large-scale AI operationalisation in the network. Ambitions for the next 2 years are high: more than half of operators plan to implement AI across multiple operational areas in the network. However, the current technological and organisational readiness of most operators does not support these ambitions.
Organisational and execution gaps and a lack of ROI clarity are slowing AI adoption	<div><div data-cs="3" data-kind="parent">Main challenges to AI adoption</div><div data-kind="ghost"></div><div data-kind="ghost"></div></div> <div><div>#1</div><div>Technology and toolset maturity</div></div> <div><div>#2</div><div>Employee skillsets</div></div> <div><div>#3</div><div>Organisational alignment (network, IT, enterprise LoB)</div></div> <div>C-level support, data strategy and compliance score relatively well</div>	Gaps in execution capabilities and ROI are reinforcing each other, keeping AI stuck in second gear Leadership commitment is relatively strong, but operators lack the execution capabilities (tooling, skillsets, organisational alignment) to get the most out of AI and prove ROI. The case for investing in those capabilities stays weak without proven ROI, making it harder for operators to realise their AI objectives.
Data availability is addressed, but turning data into model-ready assets is not	✓ Data governance, security and access maturing ✗ Model-ready data and common, unified data platforms still lacking Preparing and curating data for AI/ML models is the weakest area	A new wave of data transformation is needed Despite the data transformation initiatives undertaken by operators over the last 5+ years, most operators' data is still not readily consumable by AI models and remains fragmented across domains. These factors create one of the most significant barriers to AI operationalisation today (see slide 15). To resolve this, operators need to undergo a new wave of data transformation for AI.

Operators have AI infrastructure assets across multiple layers of the network but are not yet extracting their full value



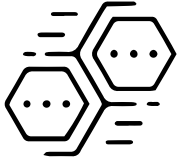
¹ Based on our discussions with operators. ² SMO = service management and orchestration; RIC = RAN intelligent controller. ³ Near-RT = near-real-time. Non-RT = non-real-time.

AI readiness: calls to action for operators [1/2]



Transform organisational structure and capabilities and build the business case from early wins

Operators should invest in AI talent and reskilling, and establish or strengthen a Centre of Excellence (CoE) to drive best practices and cross-functional alignment across network, IT and enterprise lines of business. ROI clarity will follow from focusing on use cases that deliver tangible near-term impact (see slide 17) with a long-term strategy and roadmap in place.



Invest in a new wave of AI-specific data transformation, underpinned by a long-term, cross-domain strategy

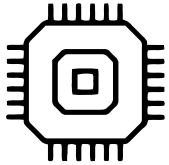
GenAI and agentic AI demand a new wave of data transformation including model-ready datasets, unified data models and common environments across network domains and the organisation. Domain-specific approaches must be underpinned by a long-term common, open data framework and toolsets to avoid integration issues, silos and duplicated efforts.



Extend your AI partnership strategy beyond technology to organisational and commercial dimensions

Operators want to move fast with AI, but the reality does not yet match their ambitions. The gap will not be closed by technology partnerships alone: operators need neutral partners that bring broader, cross-industry AI expertise and can apply this expertise to telecoms-specific contexts, spanning operating model transformation, organisational change and commercial strategy.

AI readiness: calls to action for operators [2/2]



Maximise the return on private cloud AI investments by closing the operational capability gap and moving up the stack

Operators are making strides in delivering sovereign AI infrastructure services using their private cloud infrastructure, but there is more room to maximise the ROI and reduce hyperscaler dependence. They should move up the stack, targeting the services/application layer. At the same time, they must close the cloud operational capability gap and build commercial delivery capabilities, including vertical expertise, professional services and differentiated bundled propositions.



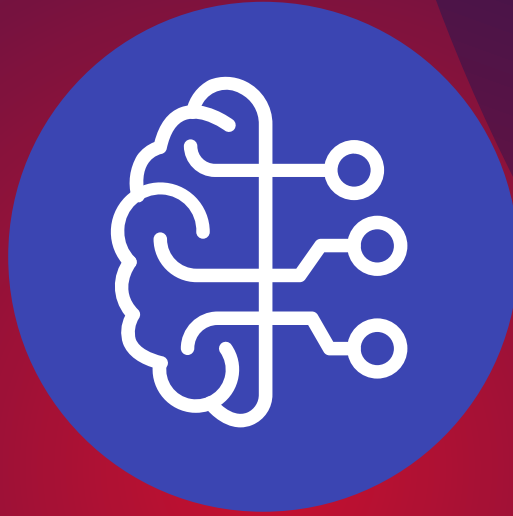
Start with AI in the SMO/RIC layer for near-term value and build towards AI-native BBU functions

Focus initial AI RAN investments on the SMO/RIC where value is clearest and disruption minimal. As confidence grows, extending AI to BBU functions using GPUs or custom ASICs will unlock deeper network intelligence and management, and can open the door to enterprise far-edge services. A clear roadmap towards AI-native RAN is essential as 6G approaches.



Establish metro edge as the near-term edge AI priority; explore far edge as AI RAN matures

The structural conditions that undermined multi-access edge computing (MEC) have materially improved for edge AI. Metro edge is the most accessible near-term entry point, and operators should leverage their mobility assets, deterministic connectivity and vertical relationships to build a strong presence, using it as the stepping-stone to far edge and AI RAN.



Technological readiness for AI

The path to an AI-native operator: technological and organisational capabilities

From a technological and organisational perspective, the path to AI-native requires excelling across the following areas.

Organisation and talent

In-house AI capabilities built on C-level and organisation-wide commitment, competence centres and CoEs driving best practices; AI-specific roles such as a Chief AI Officer; cross-functional AI teams; and structured reskilling programmes rather than reliance on outsourcing.

AI in the network

New systems designed for AI from the get-go and existing ones updated accordingly; transitioning towards open, cloud-native networks; actively shaping AI-RAN standards; and applying AI/ML, GenAI and agentic AI to high-value use cases, thus progressing towards autonomous networking through both domain-specific and cross-domain AI.

Data transformation

Continuous investment to ensure data is always ready to support AI use as the paradigm evolves, covering data governance and security, model-ready datasets, common data models, silo removal and real-time processing across network domains and the wider organisation.

Examples of operators making strides towards becoming AI-native in certain commercial aspects.¹

SK Telecom created a dedicated AI Company-in-Company (CIC) unit, centralising all AI capabilities under a single organisation with a dedicated Chief AI Group Officer.

SoftBank has built its own AI-RAN stack (AITRAS), taking the lead in deploying AI-RAN.

Telefónica Germany's Network Operations Agent (NOA) supports engineers with AI-driven network troubleshooting and availability management.

Vodafone built its Nucleus data platform with Google Cloud solutions in the early 2020s. It has been making ongoing improvements to this platform in collaboration with Google to create an AI-ready data architecture.

¹ These examples are based on publicly available information.

AI visionaries and commercial AI specialists lead in readying data for AI use and deploying private cloud AI infrastructure

	AI laggards	Middle-of-the-pack AI adopters	Commercial AI specialists	AI visionaries
Percentage of respondents with moderate-to-high technology and toolset maturity ¹	0%	50%	42%	68%
Percentage of respondents with moderate-to-high employee skillset maturity ¹	0%	0%	17%	84%
Percentage of respondents with moderate-to-high maturity for providing access to high-quality data ¹	64%	75%	100%	100%
Percentage of respondents with moderate-to-high maturity for preparing and curating data for AI/ML models ¹	16%	42%	100%	100%
Percentage of respondents that are using AI for core network design and planning	0%	42%	50%	60%
Percentage of respondents that are using AI for RAN energy management	8%	50%	50%	40%
Percentage of operators planning to deploy AI in the RIC (near-RT and/or non-RT RIC)	88%	83%	100%	100%
Percentage of operators planning to deploy AI in BBUs with GPUs	0%	67%	100%	100%

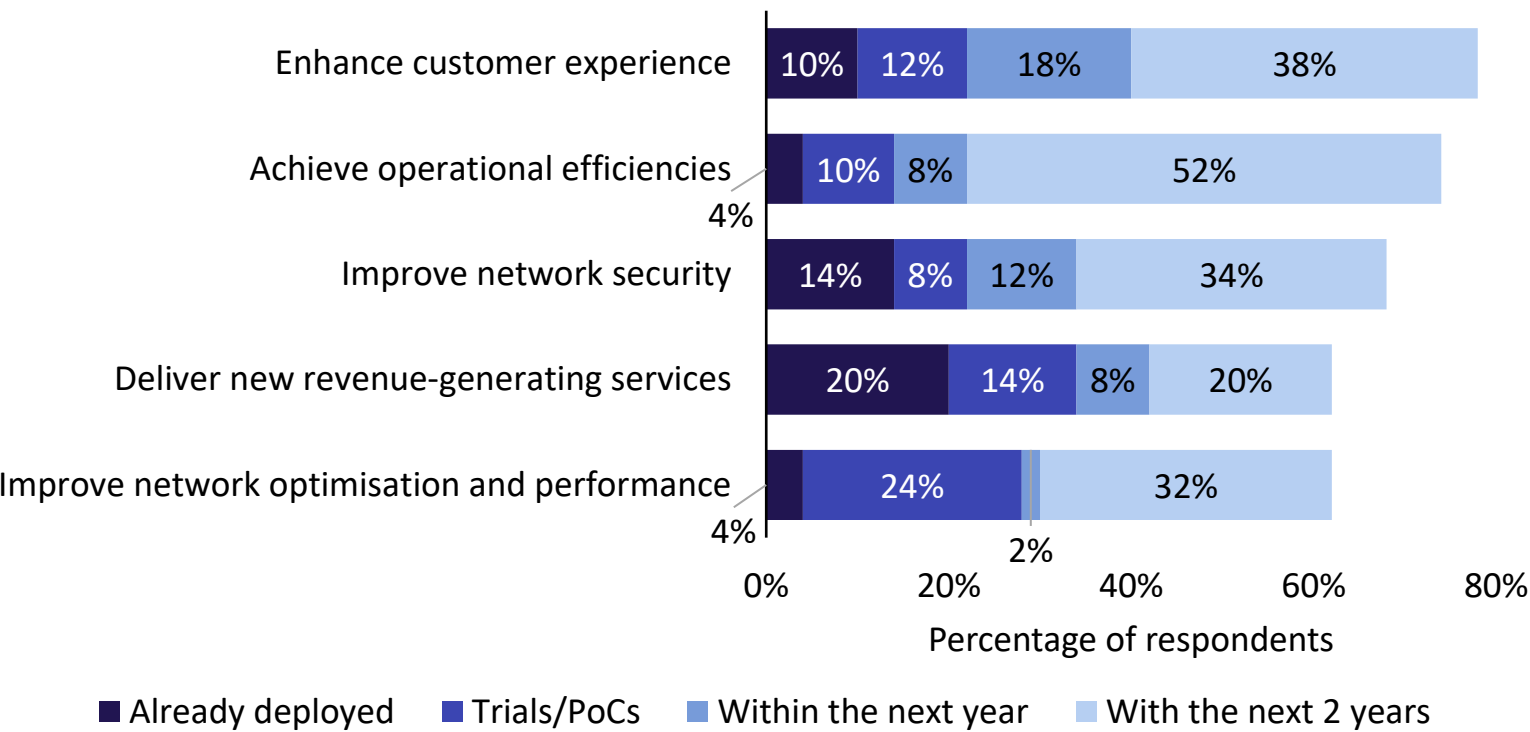
¹ Rated as 3, 4 or 5 out of 5.

Operators are committed to deploying AI across all key strategic objectives, with revenue generation and network security the top priorities

Operators are placing AI at the core of their strategic objectives. Their initial priorities primarily span launching new services (e.g. GPUaaS, AlaaS, AI voice), improving network security and resilience (e.g. anomaly detection and incident response, defence against AI-enabled attacks, LLM-driven vulnerability scanning) and enhancing customer experience with more personalised and efficient service.

More advanced network AI objectives – such as AI-driven closed-loop network optimisation and performance management, and achieving operational efficiencies across service provisioning, assurance and lifecycle management – remain longer-term priorities in support of operators’ autonomous networking goals. Some operators are already trialling these capabilities, and a significant portion expect to adopt them over the next 2 years as they build trust in AI technologies, develop their skillsets and adapt their operations to derive maximum value from AI.

[Q] Do you have plans to deploy AI in the network to support the following strategic objectives?



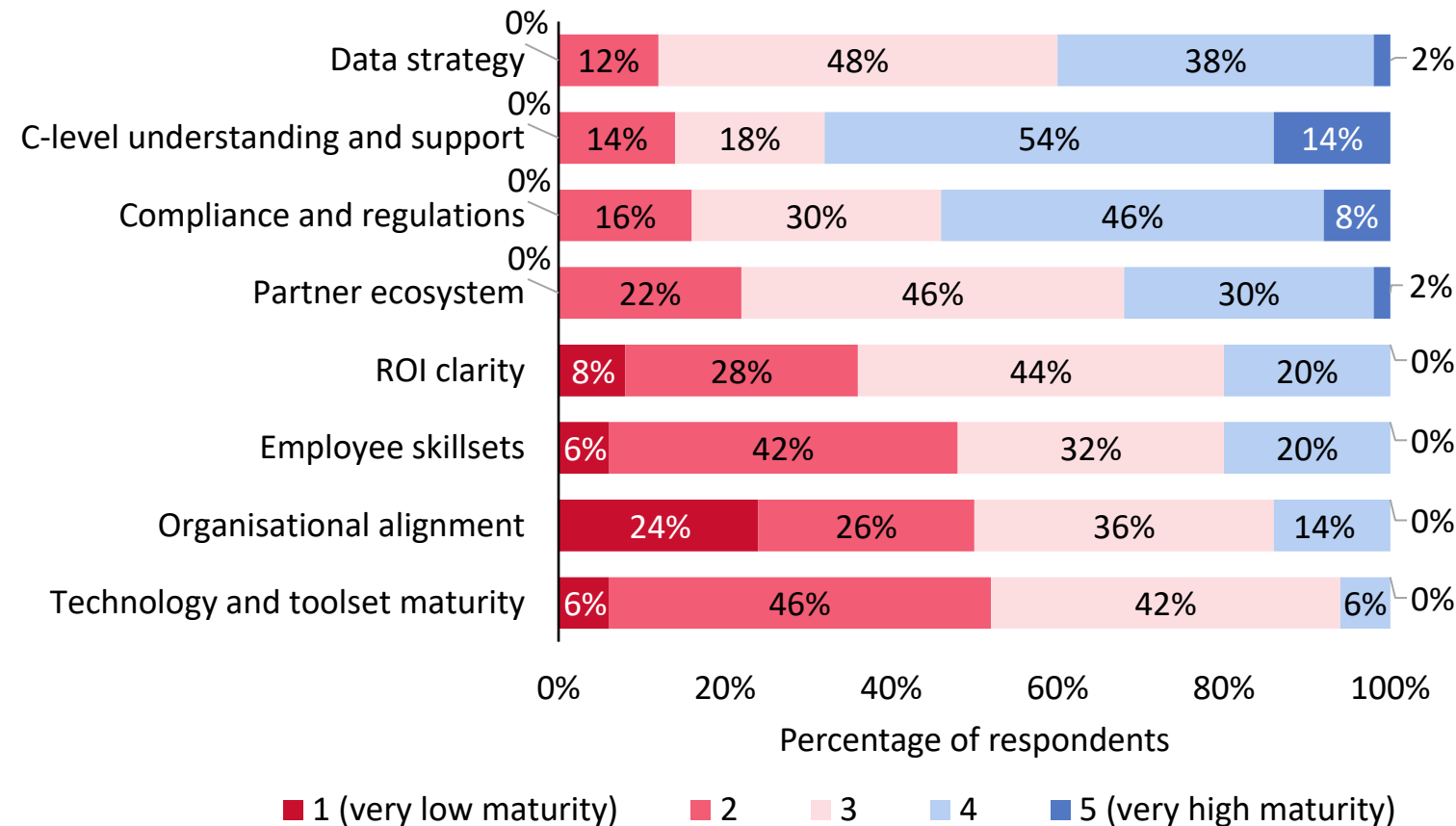
Operators have secured commitment to AI from the top of their organisations, but lack the execution capabilities to deliver

Organisational AI readiness is uneven across the board. C-level understanding and support, data strategy (despite the gaps; see slide 15) and compliance maturity score relatively well but are not yet translating into execution capability.

Technology and toolset maturity lags because AI-specific tooling for the network domain is still early and fragmented. This is exacerbated by siloed and still-maturing cloud-native operating environments. Employee skillsets are another constraint as operators compete for scarce AI and data talent and work to reskill network teams for an AI-driven operating model.

Operators have long sought to align their network, IT, enterprise and other lines of business, which is critical to commercialising new technology initiatives. Yet the divide persists, reflected in the lack of co-ordination and collaboration around AI adoption. ROI uncertainty remains a factor; the perceived risks are higher and the benefits less immediately attainable than in other areas.

[Q] How would you rate your organisation's maturity across the following aspects of adopting AI technologies in the network domain?



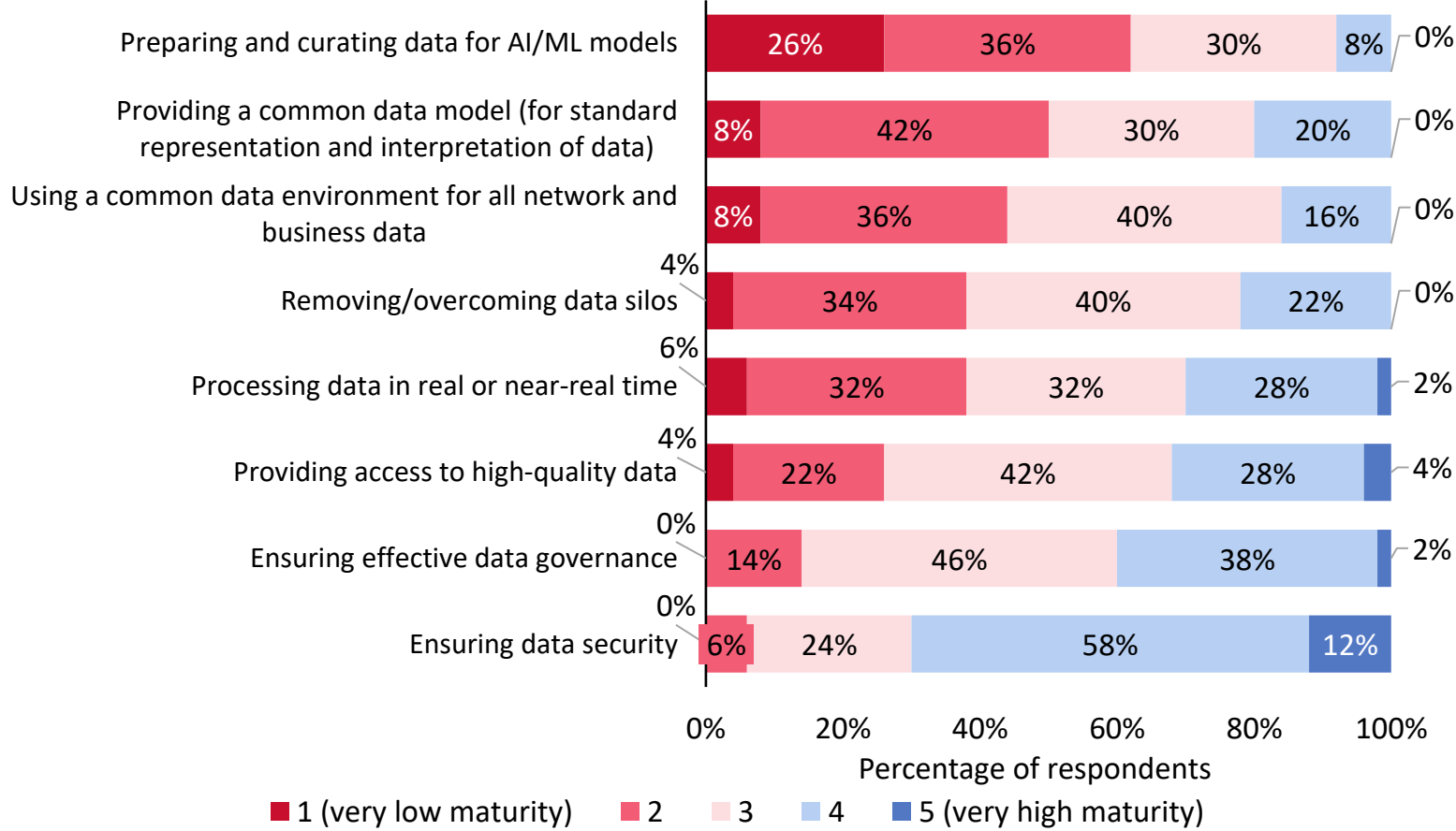
Operators need a new wave of data transformation to meet the demands of GenAI and agentic AI

Advanced operators have already undertaken data transformation projects focused on data governance and security measures. However, GenAI and agentic AI are raising the bar significantly. AI requires more than clean, well-governed data; it demands model-ready datasets, unified data models and common environments that enable operational intelligence across network domains and the wider organisation.

The results reveal a clear gap. Preparing and curating data for AI/ML models is the weakest area overall. Operators are also struggling with common data models, silo removal and real-time data processing, which are the building blocks of a truly unified data foundation.

This points to a new wave of data transformation that goes beyond current modernisation efforts. Without it, operators will struggle to move from trials and PoCs to large-scale operationalisation and may fail to establish a clear business case and ROI.

[Q] How would you rate your organisation’s data strategy in addressing the following data-related challenges of AI implementation?

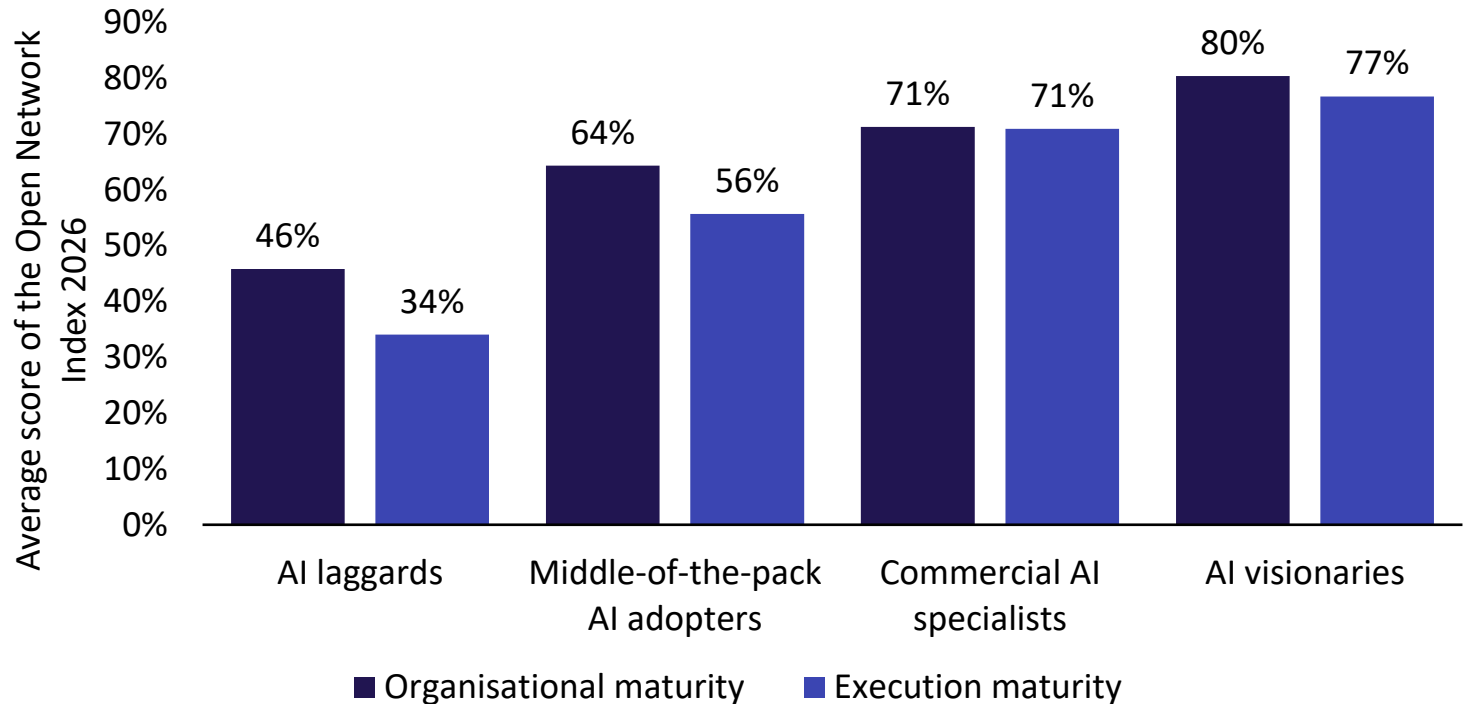


Operators with open, cloud-native networks and operations maturity are better positioned to adopt AI in the network at speed and scale

The Telco AI Readiness Index results show a clear positive correlation with Open Network Index (ONI) results, both technologically and commercially. This demonstrates that operators further ahead in adopting disaggregated, cloud-native network technologies and associated open operating models are better positioned to embed AI in their networks at speed and scale.

Successfully implementing AI capabilities requires operators to have programmability and openness in their network and automation platforms, reduce fragmentation across operations and data, and to actively participate in industry initiatives driving open standardisation in AI cloud infrastructure. This means that open, cloud-native network readiness and AI readiness are converging, and the former is fast becoming the prerequisite for AI competitiveness. Those lagging behind have the opportunity to deploy both from scratch, enabling faster progress with stronger alignment.

Open Network Index score by Telco AI Readiness Index operator category



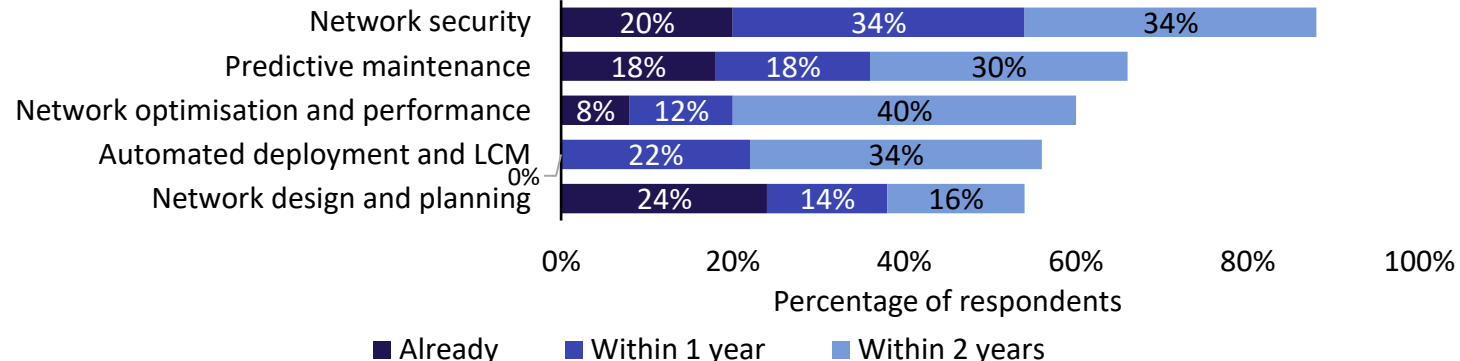
See also: Analysys Mason's [Open Network Index](#).

AI deployment in the core and RAN is still in its early stages, with network planning, security and energy management the furthest ahead

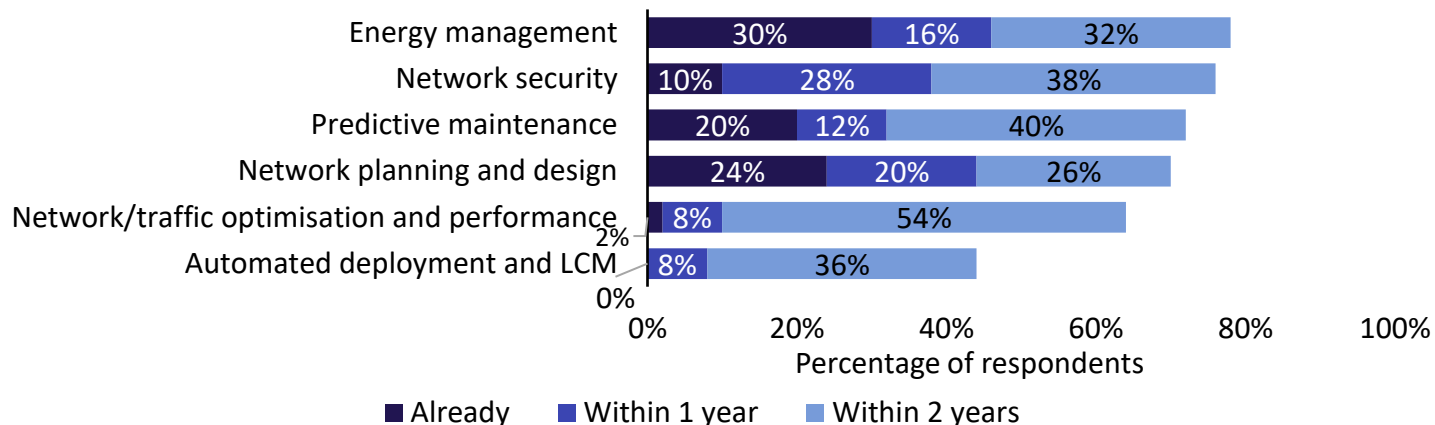
In the mobile core, network design and planning, security and predictive maintenance, which are the low-hanging fruit AI use cases in the network, are the near-term priorities for most operators. Many of the early deployments are limited in scope and scale, typically covering only part of the operational workflow. More advanced, high-impact use cases, such as network optimisation and performance management and automated lifecycle management, are planned for later.

In the RAN, AI-driven energy management takes top priority; this domain accounts for the largest share of network energy consumption (nearly 70%) and power use will continue to grow with the integration of AI and 6G. To strike the right balance between energy savings and network quality, network and traffic optimisation use cases will follow. As with the core, AI-enabled automation and orchestration is applied to network planning and design and predictive maintenance, while network security will become more important over the next 2 years.

[Q] Do you have plans to deploy AI in the mobile core network to support the following operational activities?



[Q] Do you have plans to deploy AI in the RAN to support the following operational activities?



Operators are targeting the RIC layer for near-term AI RAN value, while fully AI-native functions in the BBU are beginning to emerge

Operators want to run AI workloads to support internal RAN operations and automation, starting with AI-assisted¹ functions but moving fast to AI-native² functions.

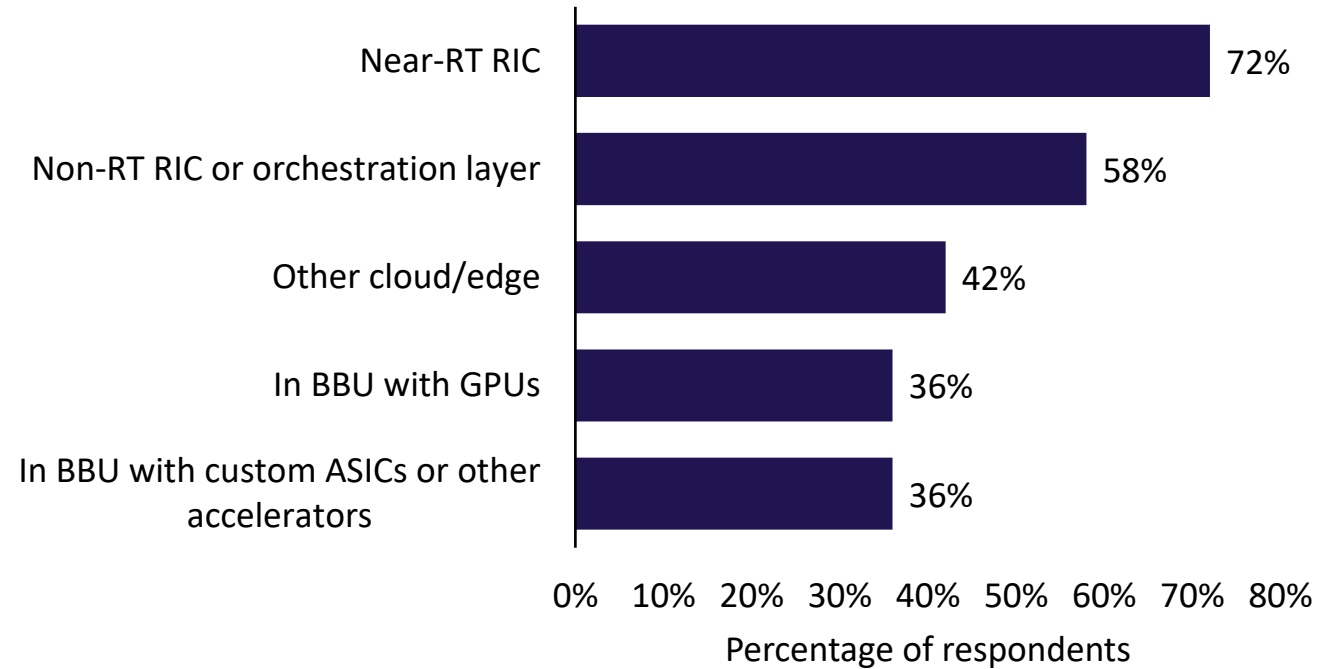
Deployment plans concentrate around the near-RT RIC and non-RT RIC. SMO plays a key role; it is where AI delivers significant near-term value (closed-loop optimisation, energy management and predictive maintenance) without requiring substantial RAN infrastructure changes.

Some operators are already using AI/ML-assisted functions in the BBU, such as beamforming optimisation. The use of GPUs or custom ASICs for fully inference-based, AI-native functions is the next frontier. Operators can also potentially target enterprise far-edge service opportunities, and to some extent consumer services. However, the business case is challenged by unclear market demand, GPU costs and power consumption, while resource contention between RAN and AI workloads adds further operational complexity.

¹ A network control function where part of the function code relies on AI/ML inferencing.

² A network function where the primary code runs as an inference workload based on an AI model, replacing multiple functional blocks.

[Q] In which areas of the network do you expect to deploy AI RAN capabilities?



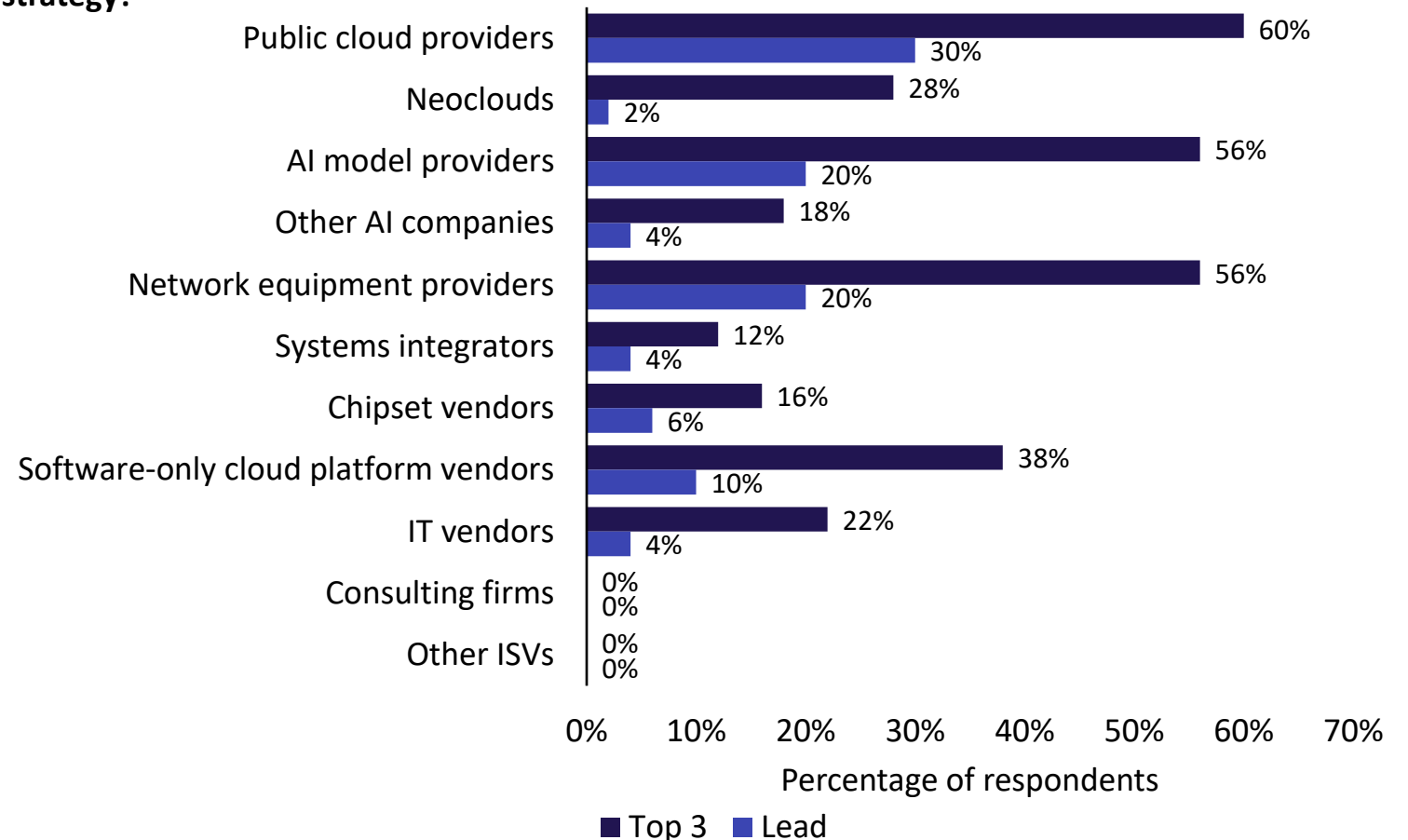
Public cloud providers, NEPs and AI model providers dominate operator AI partnerships, with software-only cloud and IT vendors emerging

Operators are primarily turning to three players in the AI market for strategic partnerships to accelerate their AI adoption.

- Public cloud providers, with which many operators already have IT and network transformation engagements, and AI is a natural extension
- Network equipment providers, which provide the network and OSS applications and expertise for AI in the network
- AI model providers, whose foundation and domain-specific models underpin both internal AI applications and new customer-facing services

Software-only cloud platform vendors (e.g. Red Hat, VMware by Broadcom) and IT vendors (e.g. Dell, HPE, IBM) are likely to gain a stronger role in operators' partnership strategies as they look to adopt more open and flexible AI infrastructure and operating models at scale.

[Q] Who are the top 3 strategic partners and lead partners that support you with your AI strategy?





Commercial readiness for AI

The path to an AI-native operator: commercial capabilities

From a commercial perspective, the path to AI-native requires excelling across the following areas.

Sovereign AI infrastructure

Extensive on-premises AI infrastructure underpinning GPUaaS and B2B/B2C services, with metro- and far-edge build-out supporting high-value distributed AI use cases.

Full-stack AI services across verticals

Enterprise AI spanning the full stack, from infrastructure to applications, targeting sovereignty-sensitive verticals (government, healthcare, defence, banks) and tapping into consumer with AI-driven services (AI voice, AI-based digital assistants).

Differentiated, bundled propositions

Connectivity tied to B2B AI solutions with strict SLA guarantees, positioning the operator as the trusted, sovereign partner of choice for enterprises.

Broad and strategic partner ecosystem

A diverse ecosystem spanning hyperscalers, systems integrators (SIs), neoclouds and AI model providers, enhancing and extending the operator's own service portfolio.

Examples of operators making strides towards becoming AI-native in certain commercial aspects.¹

Deutsche Telekom has deployed an AI factory with 10 000 NVIDIA GPUs, targeting the German industrial sector with sovereign AI compute.

China Mobile has developed industry-specific AI models and applications and is positioning itself as a one-stop shop for enterprises through offering an end-to-end solution portfolio.

Orange Business offers professional services to support enterprises' AI-based digital transformations; these services encourage take-up of its LLM platform and GPUaaS solution.

SK Telecom created the K-AI Alliance to facilitate collaboration between itself and other South Korean AI companies.

¹ These are based on publicly available information.

AI visionaries and commercial AI specialists lead in deploying B2B/B2C AI use cases and overcoming data and other challenges

	AI laggards	Middle-of-the-pack AI adopters	Commercial AI specialists	AI visionaries
Percentage of respondents that plan to use AI to launch new revenue-generating services	32%	92%	100%	100%
Average number of categories of B2B/B2C AI services offered ¹	0.0	1.0	3.3	4.4
Percentage of operators that have launched GPUaaS offerings	0%	0%	75%	100%
Percentage of respondents with the ability to bundle AI services with other ancillary B2B services ²	12%	58%	50%	100%
Percentage of respondents with the ability to offer vertical-specific expertise ²	20%	50%	75%	80%
Percentage of respondents with the ability to offer edge-enabled, low-latency inference ²	4%	42%	75%	80%
Percentage of respondents that consider public cloud providers as a top 3 partner for their AI strategy	84%	42%	25%	20%
Percentage of respondents using or planning to use private cloud AI infrastructure to deliver B2B/B2C services	52%	92%	100%	100%

¹ Of the categories shown in the chart on slide 23. ² Rating maturity as a 4 or 5 out of 5.

Operators plan to offer AI services across the stack, with sovereign enterprise applications and consumer services leading the way

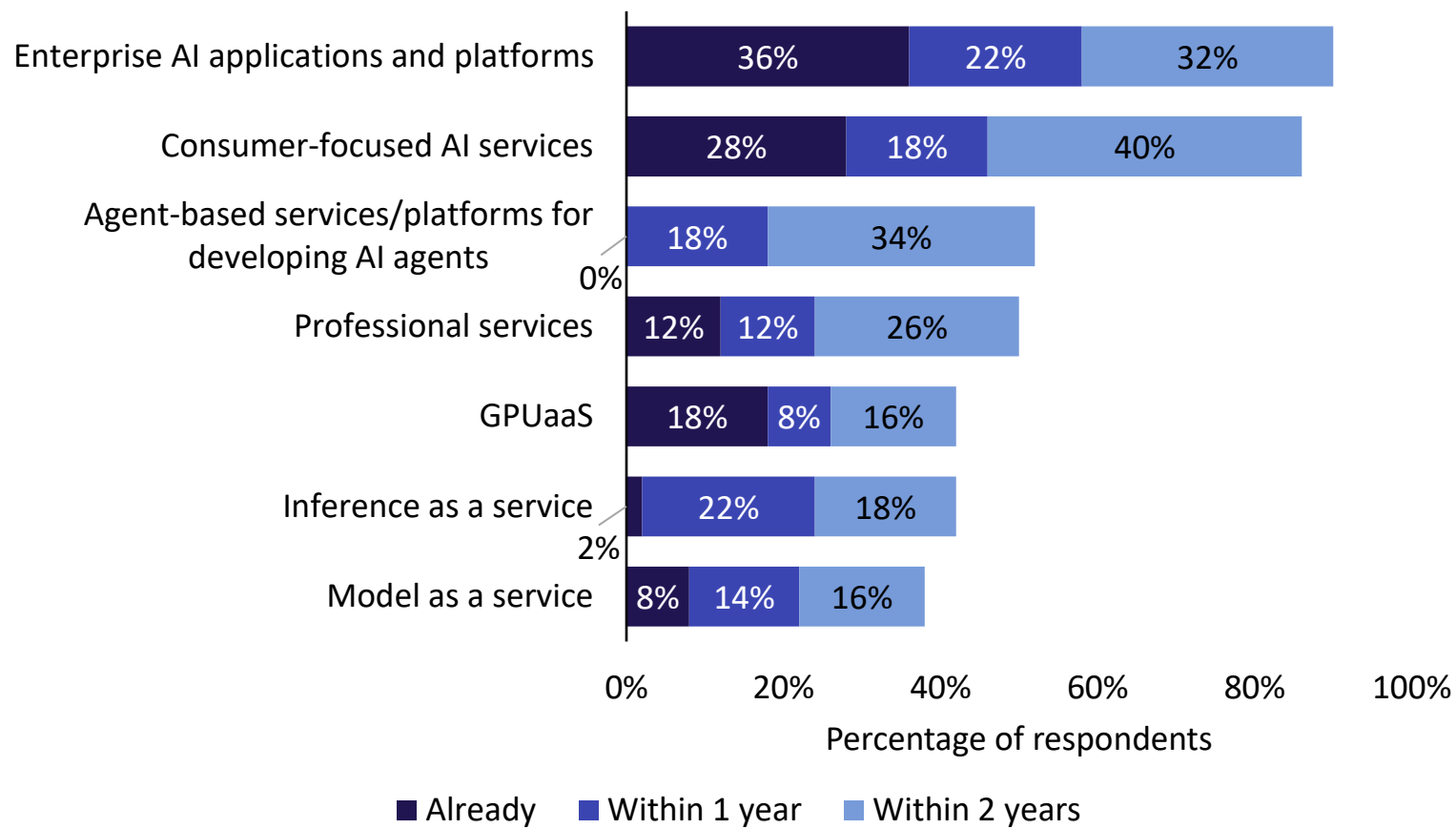
Operators are targeting opportunities across the AI stack, but their primary focus is on the applications and services layer to monetise their AI investments beyond mere infrastructure.

As of the end of 2025, 29 operators¹ had launched a GPU-as-a-service (GPUaaS) offering. These operators are not aiming to compete with hyperscalers and neoclouds on cost and scale, but rather look to provide sovereign infrastructure combined with professional services and connectivity offerings for delivering applications and services. Some operators differentiate further by targeting specific verticals, either through existing AI applications or by developing new, bespoke ones. The SME market is increasingly in focus, given that smaller businesses typically lack the in-house AI expertise to self-serve.

Agent-based services are also emerging, with operators developing customer engagement tools, concierge agents and other agent-based capabilities to enhance their service portfolios.

¹ See Analysys Mason's [Telecoms operator GPUaaS tracker](#).

[Q] Do you have plans to provide the following AI services to your customers?



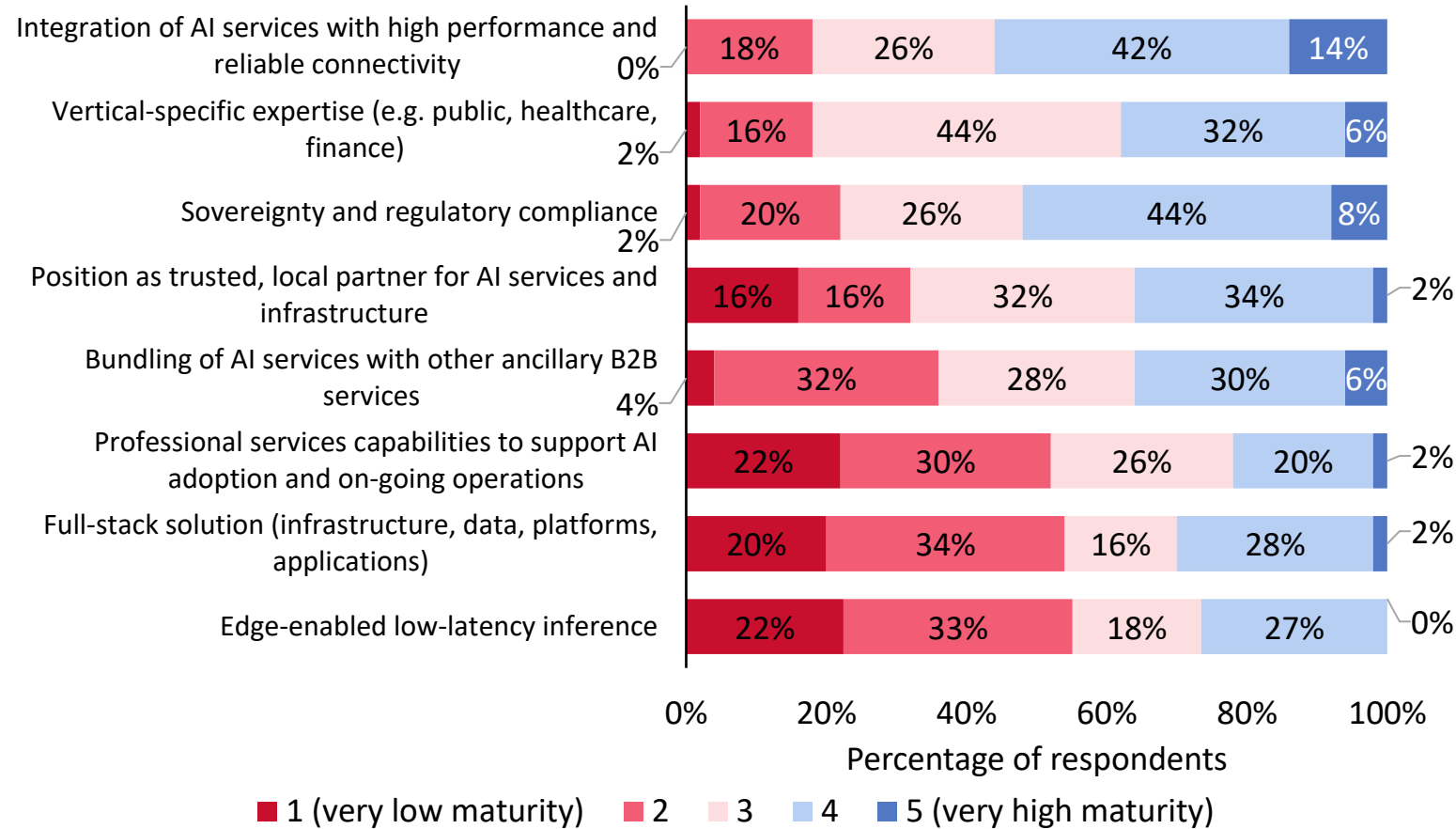
Connectivity and sovereignty are operators' strongest B2B AI credentials, but cloud and professional services capabilities lag

Operators are broadly confident in key aspects of the delivery of successful B2B AI services, including offering connectivity for AI, supporting sovereignty and compliance requirements, being a trusted local partner and having vertical-specific expertise. These aspects play to operators' existing strengths.

Some of their current weaknesses are historical: building and operating a full-stack cloud infrastructure and development environment competitively is something only a handful of operators have managed to achieve. A distributed edge proposition is a natural extension of this challenge, compounded by the failure of many MEC¹ initiatives due to additional factors such as lack of developer ecosystem and limited commercial value.

While some operators have strong professional services capabilities, these vary significantly across the market. Many operators will likely forge partnerships with SIs to plug this gap.

[Q] What is your organisation's level of maturity in addressing enterprise requirements for B2B AI services?

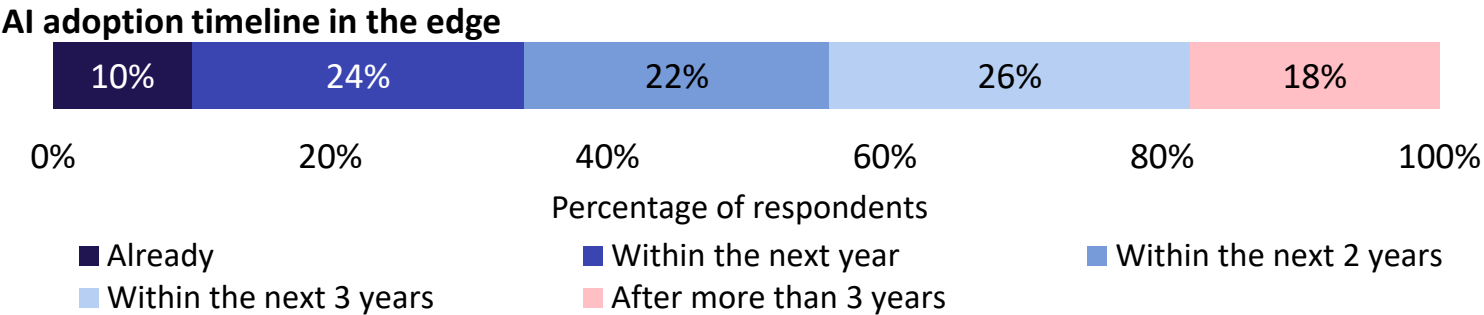


AI is reviving operators' edge computing ambitions as inference and AI agents drive distributed, sovereign infrastructure and connectivity needs

Edge AI is entering operators' strategic agenda, driven by the shift to inference workloads and the growing demand for distributed, reliable and sovereign compute and connectivity infrastructure, which gives operators a defensible market position.

A key benefit is the ability to deliver high-quality, low-latency inferencing; this is essential for industrial and manufacturing monitoring and automation, real-time video analytics and computer vision use cases. Edge AI also addresses the need to process inputs from large numbers of concurrent users or devices without backhauling data to centralised data centres, and keeps sensitive data local to meet sovereignty and compliance requirements. Relevant use cases include content delivery and personalisation, public safety and smart cities.

Mission-critical use cases will require all of these properties, alongside the ability to meet strict SLA requirements.



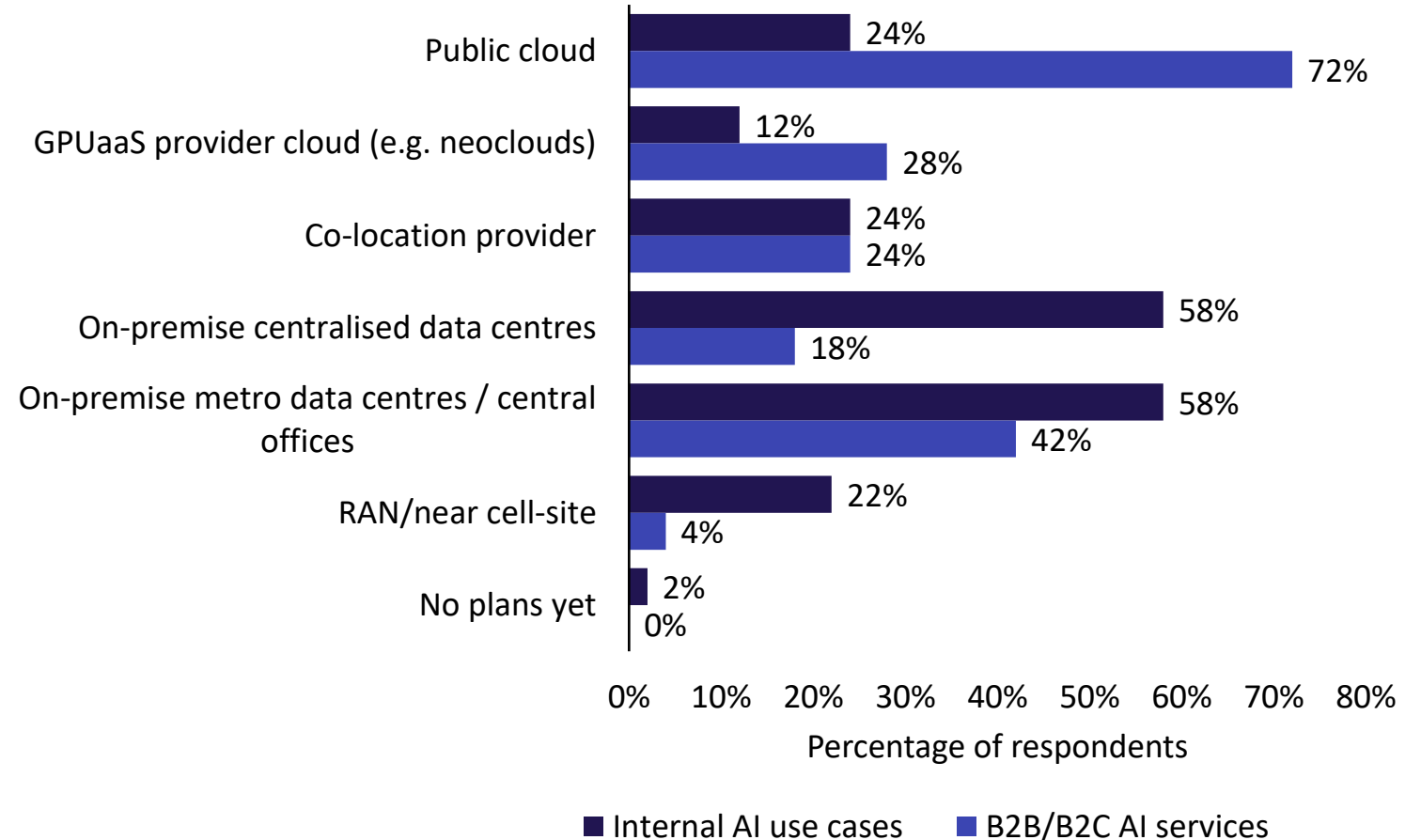
¹ V2X = vehicle-to-everything

Private cloud dominates the delivery of internal AI use cases, but operators rely heavily on public cloud to deliver B2B/B2C AI services

Telco AI cloud infrastructure is becoming increasingly hybrid. On-premises private cloud is widely used for internal AI deployments across centralised and metro data centres; this is driven by sovereignty requirements and a desire to maximise return from AI factory investments. Public cloud, co-location and third-party GPUaaS are also used where technical, commercial and compliance considerations allow. Distributed AI deployments are targeted for metro data centres, while AI RAN is mainly for internal use cases.¹

For B2B/B2C AI services, public cloud dominates, as a result of existing partnerships with PCPs, the attractiveness of PCPs' AI platforms and workloads already running on PCP infrastructure. Utilisation of operators' own private GPUaaS infrastructure remains low, reflecting both the early stage of deployments and an inability to match hyperscaler full-stack capabilities. However, growing sovereignty concerns may boost operators' fortunes.

[Q] Where are you deploying / where do you expect to deploy your AI technology stack?



¹ See slide 18 for details on AI RAN.



Annex

Telco AI Readiness Index operator category definitions [1]

Category	Definition
AI-native	The aspirational end state for the industry, where AI/ML, GenAI and agentic AI are fully embedded at the core of network architecture, operations and services from the ground up. In a truly AI-native operator, AI is not a layer added on top of existing infrastructure but the foundational principle governing how networks are built, automated and monetised. Autonomous network operations, self-optimising infrastructure and AI-driven service delivery define this state. No operator has reached this stage yet, but it defines the destination that AI visionaries are actively building towards.
AI visionaries	Operators with strong technological and commercial AI readiness that are actively leading the path to becoming AI-native. They have a clear AI vision and strategy, and strong organisational alignment. They are on the verge of scaling AI use cases across the network, while simultaneously building and launching AI services for enterprise and consumer markets. Their open, cloud-native network foundations give them a head start in embedding AI at speed and scale.
Commercial AI specialists	Operators that have moved fast to tap into AI service opportunities in enterprise and consumer markets, achieving strong commercial readiness and launching offerings such as GPUaaS, AlaaS and vertical AI applications. However, their technological foundations, including network AI deployment, data strategy and operational platforms, have not kept pace with the AI visionaries, creating a gap that will need to be addressed to sustain growth and competitiveness.

Telco AI Readiness Index operator category definitions [2]

Category	Definition
Middle-of-the-pack AI adopters	Operators making moderate and broadly balanced scores across technological and commercial readiness dimensions. They have begun experimenting with AI use cases (and are moving to limited commercial stage in some areas) and have started developing AI service propositions. However, they lack the strategic clarity, organisational alignment or technology maturity to accelerate at the pace of leaders. They risk falling further behind if they do not address their organisational and data gaps and commit to a more decisive AI strategy.
AI laggards	Operators at an early stage of their AI journey, with low maturity across technological, organisational and commercial dimensions. Many are stuck moving from trials and PoCs to large-scale operationalisation, held back by weak C-level engagement, unclear ROI, poor cross-organisational alignment and insufficient data and technology foundations. Without a significant shift in strategy and investment, the gap between this group and AI visionaries will continue to widen.

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We support clients with decision-making and complex change journeys

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We unlock value from complex technologies, with commercial strategies for businesses and regulatory strategies for governments and regulators, so they can **maximise opportunities**



Transaction Practice

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We manage and de-risk the transition from strategy to execution to make our clients' organisations future-ready, ensuring that strategies **deliver measurable value**



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We provide insights and data on foundational technology and digital infrastructure that helps clients anticipate the future, enabling them to make **evidence-based, robust decisions**



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www.analysysmason.com | enquiries@analysysmason.com



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