

# AI Accelerates Carrier Business Transformation

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2025.09.29 Kingston

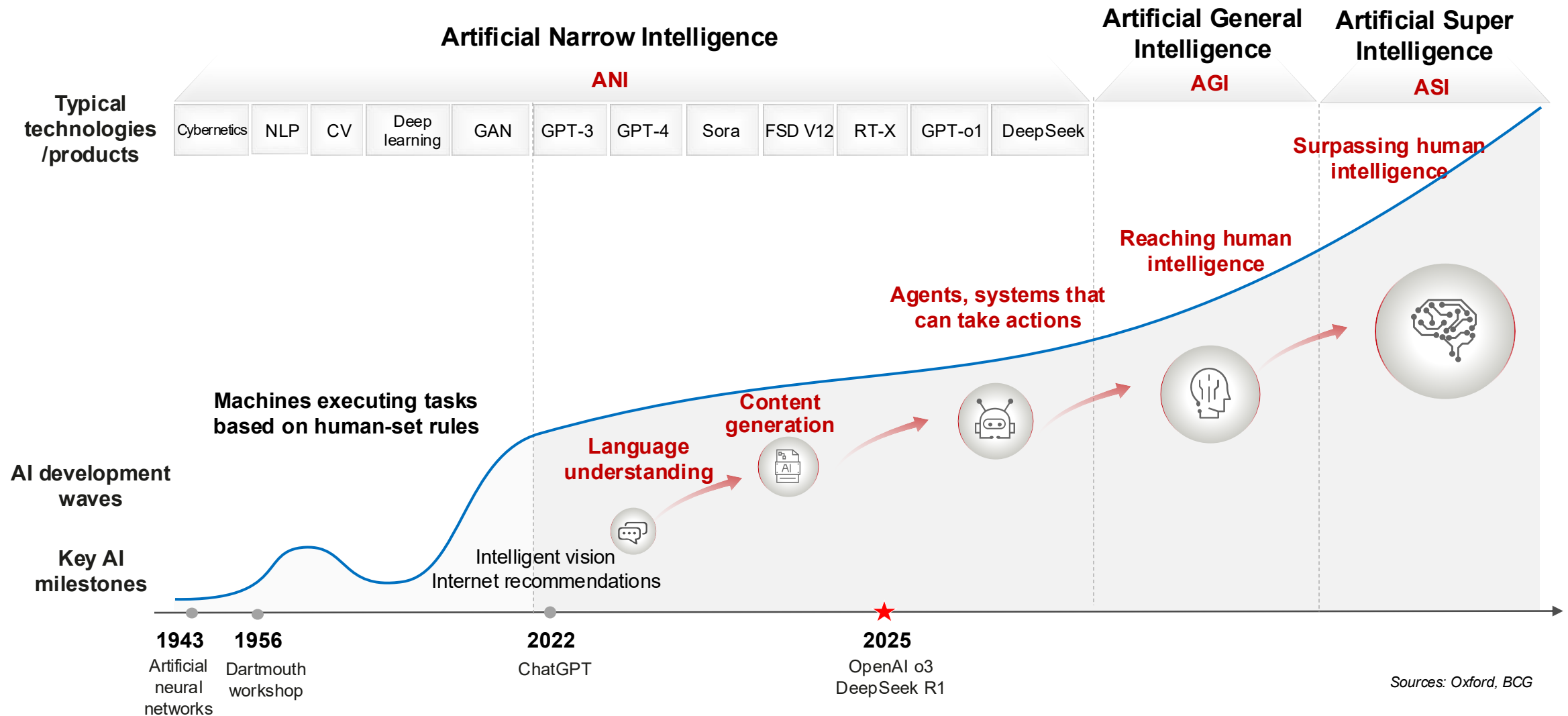
Han Sai

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- 1. Global AI Trends**
2. AI Brings Opportunities and Transformation to Carriers
3. AI adoption in LAR Carriers

# AI: Everything we imagine today is too little for tomorrow



# An intelligent world powered by AI promises better lives and society

**Healthcare:** A **10x** increase in new drug development success rate and a **50%** reduction in the 10-year drug development cycle

Smart health services for enhanced quality of life



**Food:** Over **840 mn** people affected

Data-driven food production for more bountiful, inclusive, and "green" diets



**Living spaces:** **US\$4.5 tn** global consumer device market by 2030

Personalized spaces with novel interactive experiences



**Transportation:** A **US\$1.5 tn** global intelligent driving industry by 2030

Smart, low-carbon transportation opening up the mobile third space



**Cities:** More AI agents than humans by 2032, **864 ZFLOPS (FP16)** in AI computing power by 2030

City Intelligent Twins for comprehensive digitalization



**Enterprises:** **79.5%** of embodied AI applications deployed in industrial settings and **1,000** robots for every 10,000 workers by 2030

New productive forces, new production models, new resilience



**Energy:** **65%** renewable energy share in power generation by 2030

Intelligent, green energy for a better planet



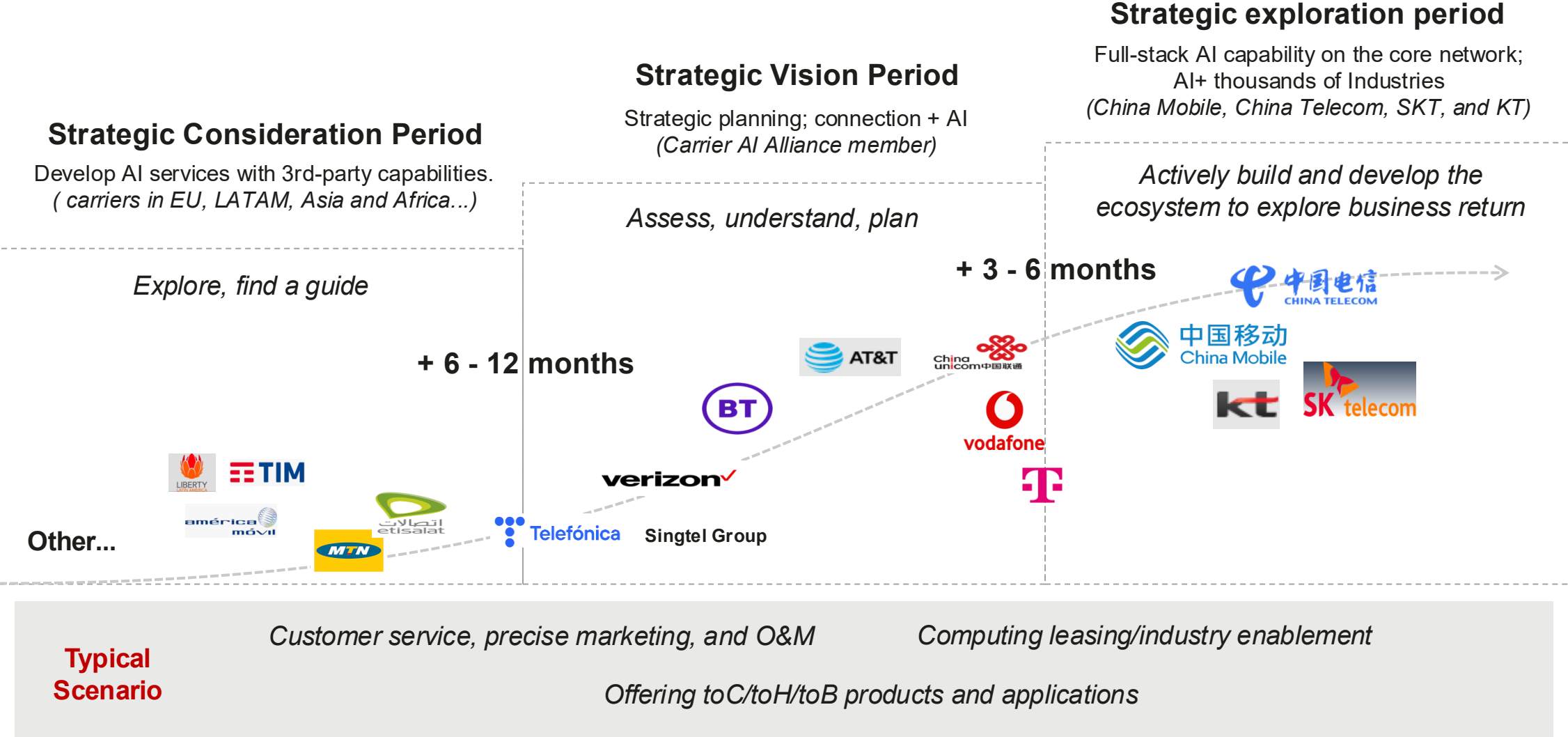
**Digital trust:** Privacy-enhanced computing technologies used in more than **50%** of computing scenarios by 2030

Technologies and rules creating a trusted digital future



Sources: Entrepreneurship Research Center, AI Device White Paper, Intelligent World 2030, and Huawei predictions

# Global Carriers Explore AI Application Based On Its Own Endowment



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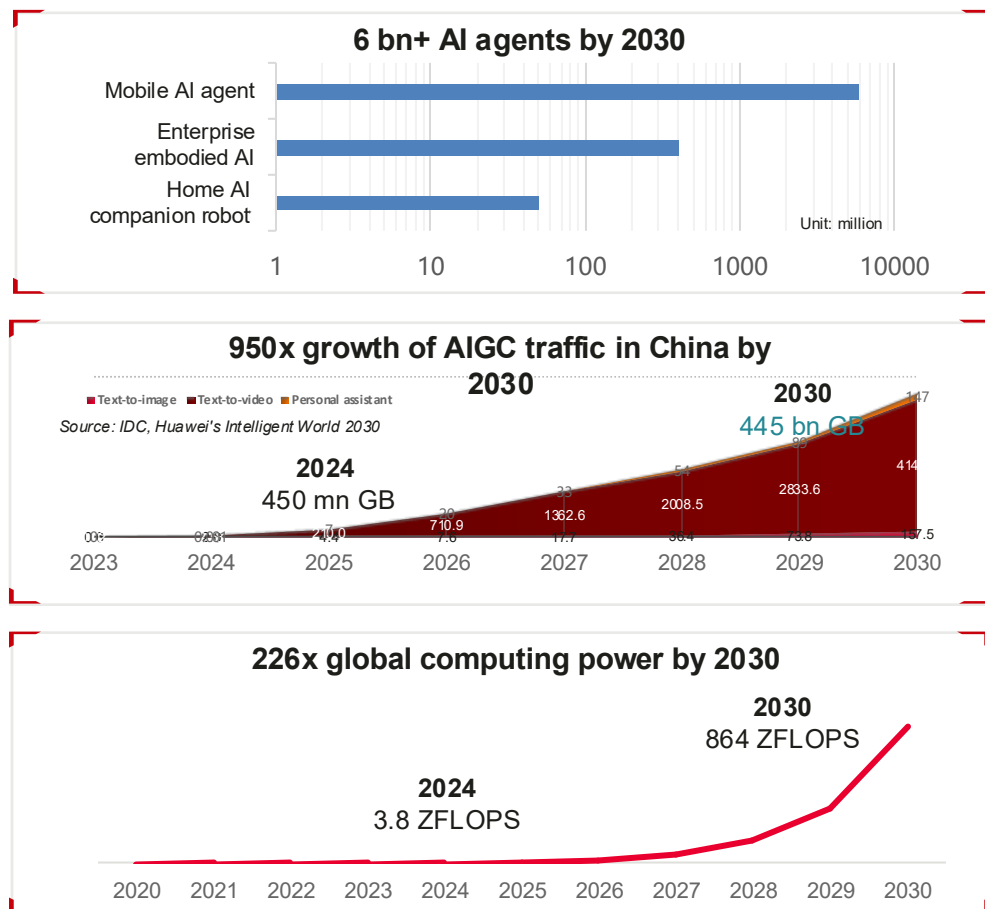
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# AI Leads to Explosive Growth of ICT Demand in Society and Business Requirements Drive Carriers to Improve Operations

AI drives a surge in ICT demand.

The significant opportunities brought by AI clash with carriers' operations.



Surge of AI applications in society

- 5 mn active apps, 100x increase of AI apps a year

User growth bottleneck

- 30% to 80% penetration rate in emerging market
- 80% to 110% penetration rate in DM market
- 110% to 200% penetration rate in China, Japan, and South Korea

Wider pipes

- Wireless access 1G / GPON 10G
- Optical 800G era

Stagnant APRU

- The growth rate in the last five years is lower than 1 pp.

Increasing digital and intelligent requirements in society

- AI investment: USDXXX00 bn by 2030

Increasingly pipelined

- Market value of top 10 carriers/Market value of top 10 OTTs = 1:11

Carriers need to seize opportunities in the intelligent era and develop innovative intelligent applications to drive user growth and traffic monetization, and gain more value in the industry chain.

# Carriers Should Seize the Opportunities Brought By AI

## Improving customer experience and network efficiency with telecom AI foundation model



### Customer service

- GenAI chatbots for customer calls
- Getting deep customer insights



### Precise marketing

- Product personalization assisted by AI
- Customer experience & retention



### Intelligent O&M

- AI assisted for network design and planning
- Intelligent network and power management

**Most carriers are taking actions now !**

## Building AI infra and models for industry enablement and computing network leasing



### Industry enablement

- Provide invoking & training for models
- Industry large models customization



### Computing network leasing

- Computing power resources leasing
- Network connection & orchestrating

**Carriers reach to full-stack AI in the future !**

**AI products should be ready, to “grab hold” the entrance of toC/toH/toB**

ToC  
AI application

Intelligent device  
Intelligent assistant

ToH  
AI application

Intelligent housekeeper  
Intelligent TV

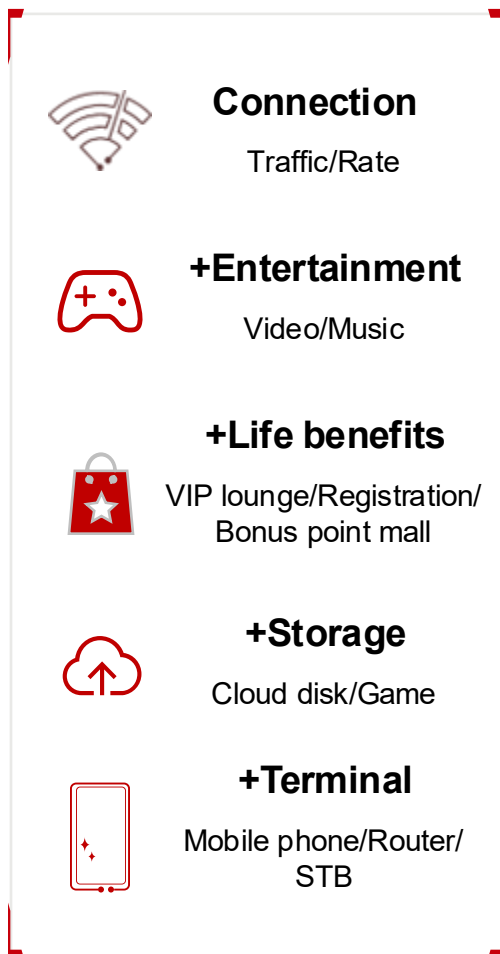
ToB  
AI Application

Customer service  
Intelligent office

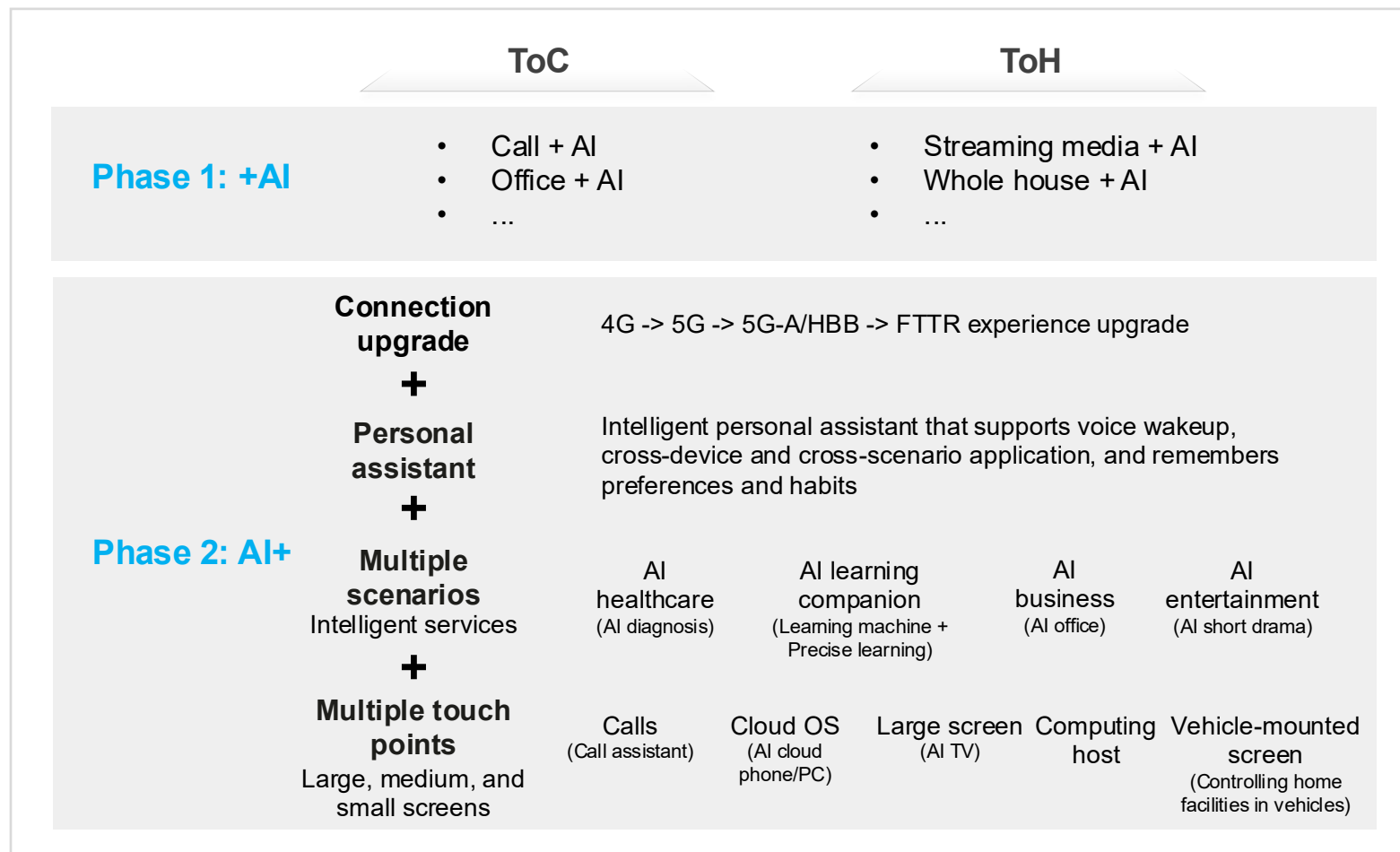


# ToC/ToH: Gradually Transition from Traditional Services + AI to Combined Products and Offerings Centering on Personal Assistants

**As is: connection-centric**



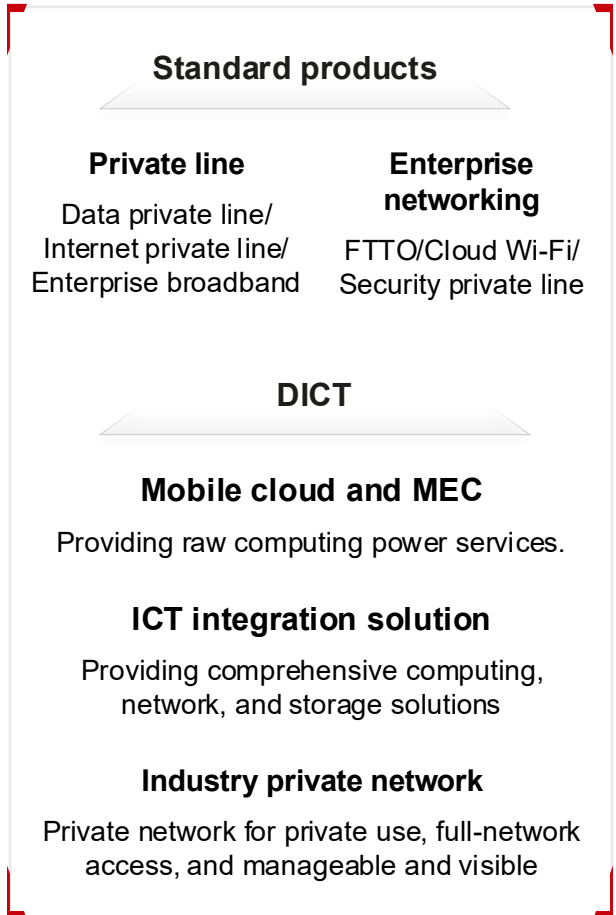
**To be: Based on connections, focusing on AI, develop combined products and offerings by phase**



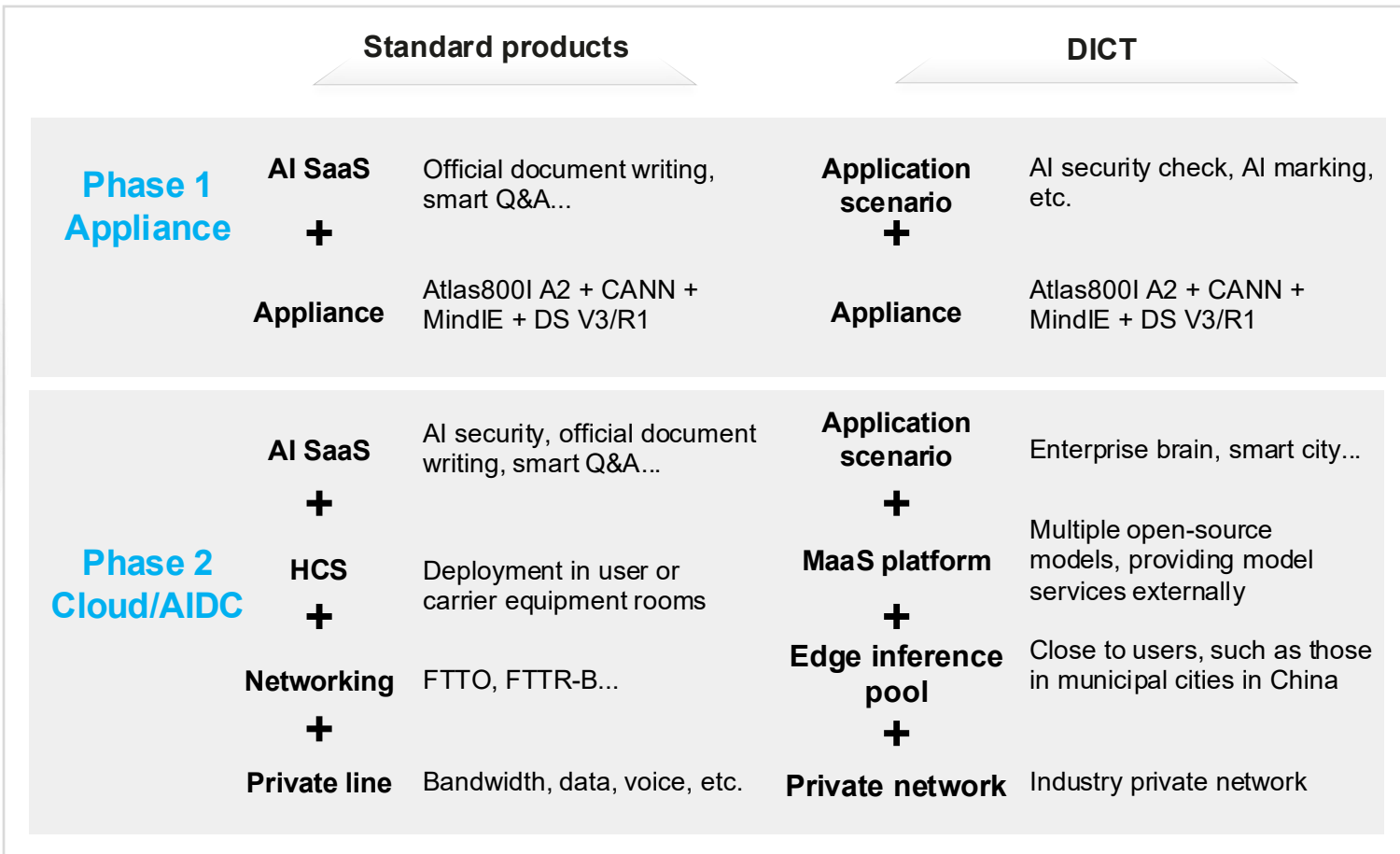
**Develop ToC AI services in phases. Phase 1 focuses on AI enablement for traditional services. In phase 2, combined products and portfolios centering on personal assistants are developed, integrating connections, entries, and scenarios.**

# ToB: Reconstructing Enterprise Standard Products and DICT Services with AI by Phase

As is: mainly standard products and DICT



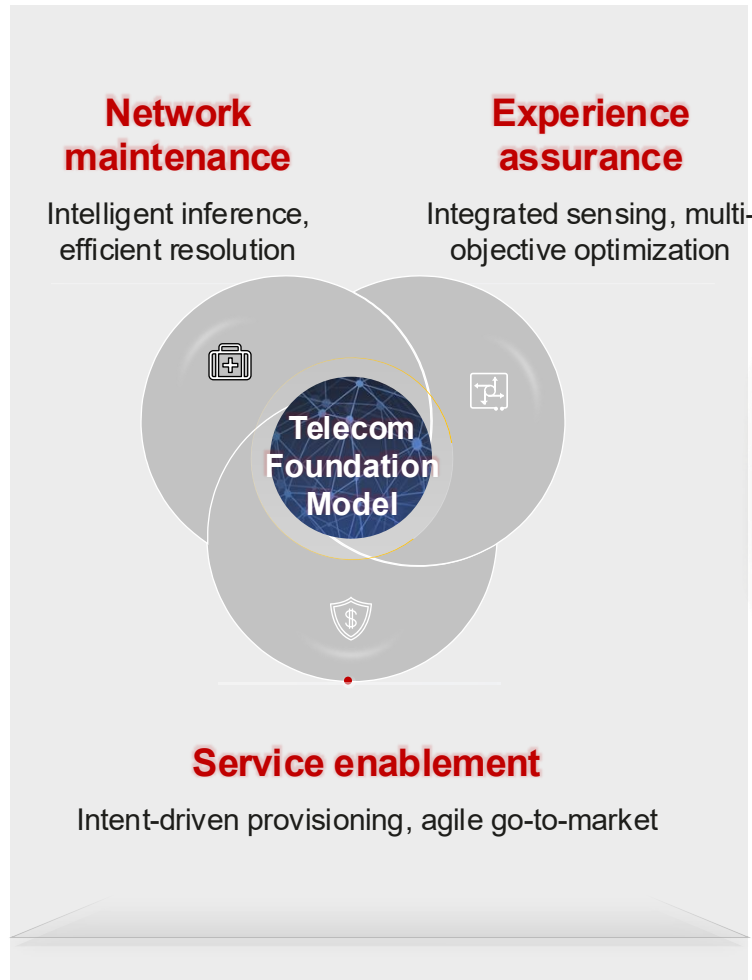
To be: restructure enterprise business by phase using AI



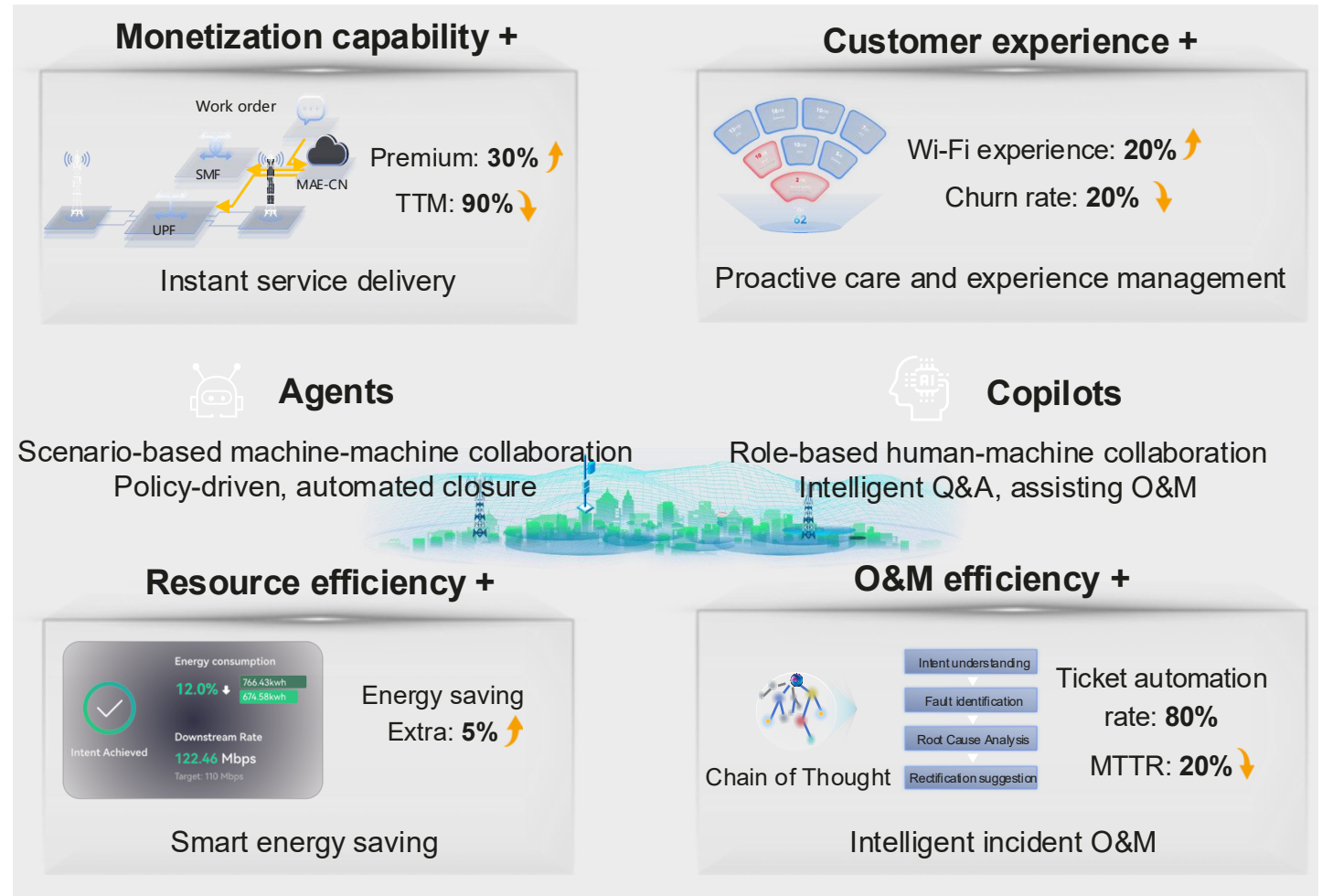
Develop ToB AI services in phases. In the initial phase, appliances are used to quickly build AI service capabilities. In the later phase, the computing-network-cloud synergy is used to build combined competitiveness in the ToB domain.

# AI for Network, Improving Network Efficiency & Experience

## Telecom Foundation Model

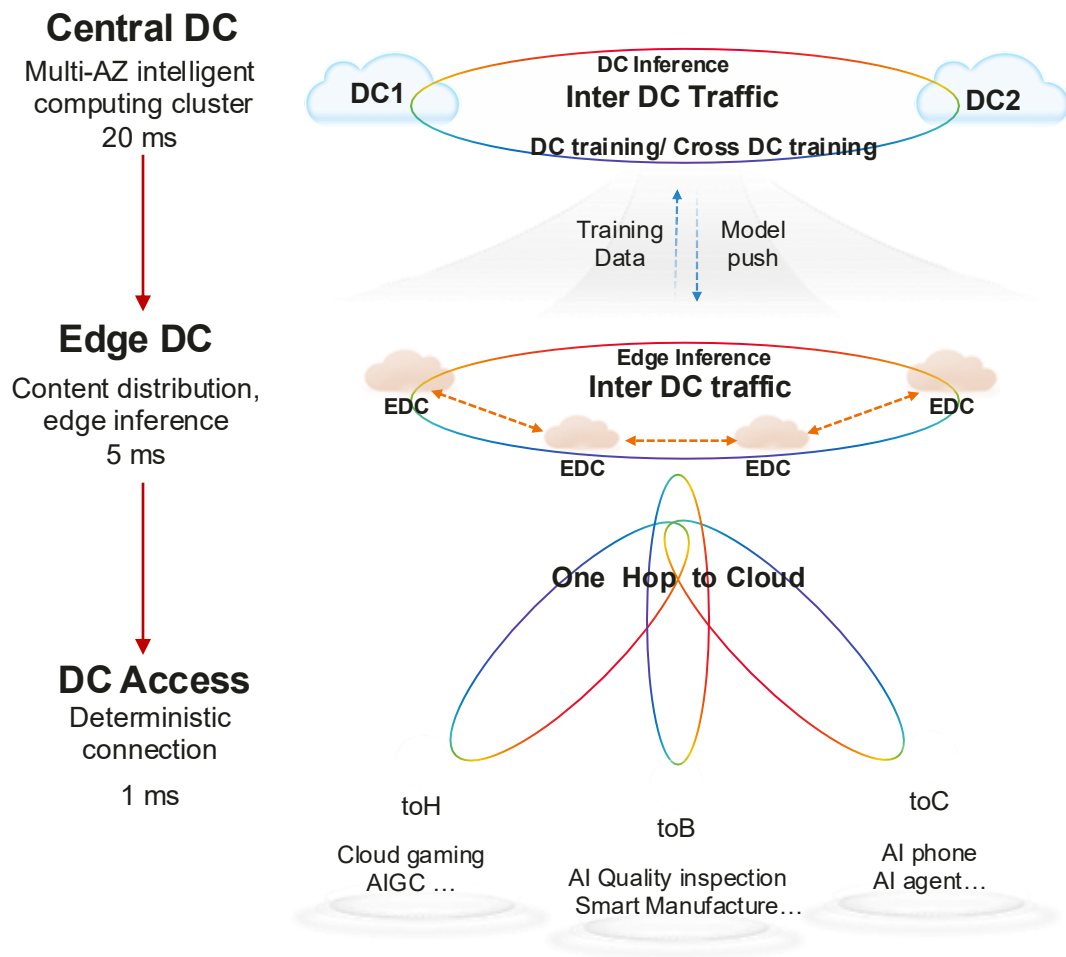


## Value Creation



# Network for AI, Boosting the Value of ICT Infrastructure

## AI - Centric Target Network



## Lossless & High throughput DCN\*

Elastic flattened  
networking

Network Scale Load  
Balancing

Autonomous  
Engine

Supporting super computing clusters

## High-performance & Cross Region DCI\*

Lossless transmission  
on WAN

Super  
connectivity

High  
reliability

Orchestrating multiple computing centers

## Agile access for AI services DCA\*

Super uplink

Deterministic Latency

Supporting AI service inference& computing

\*DCN: Data Center Network \*DCI: Data Center Interconnect \*DCA: Data Center Access

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# Latin American carriers are defining their path to the AI Era

**10+** carriers

*Started to explore AI strategy or projects in LATAM*



AI through all customer journey

**telecom**

Technological and cultural transformation supported by the potential of AI



Use AI to revolutionize customer experience

...

*LAC carriers are orienting their AI adoption strategy based on the “Taker” approach*

## Customer Service

**Liberty**



Cooperate with AWS, using MaaS model to implement AI, **improving customer service and efficiency.**

**AM**



Refining Customer Engagement and improving experience through AICC under two models.



**Self-Use**

**2B Selling**

## Product & Marketing

**Telecom Argentina**



Implementing an AI-enabled virtual assistant in the “**Mi Personal Flow**” self-care app.



Advanced AI-based analytics to determine **customer preferences, behaviors and needs.**

Developing personalized offer based on obtained customer insights, to later proceed to **precise marketing.**

## Operation & Maintenance

**TIM**



- Applying GenAI to network
- **10% target reduction** on maintenance costs

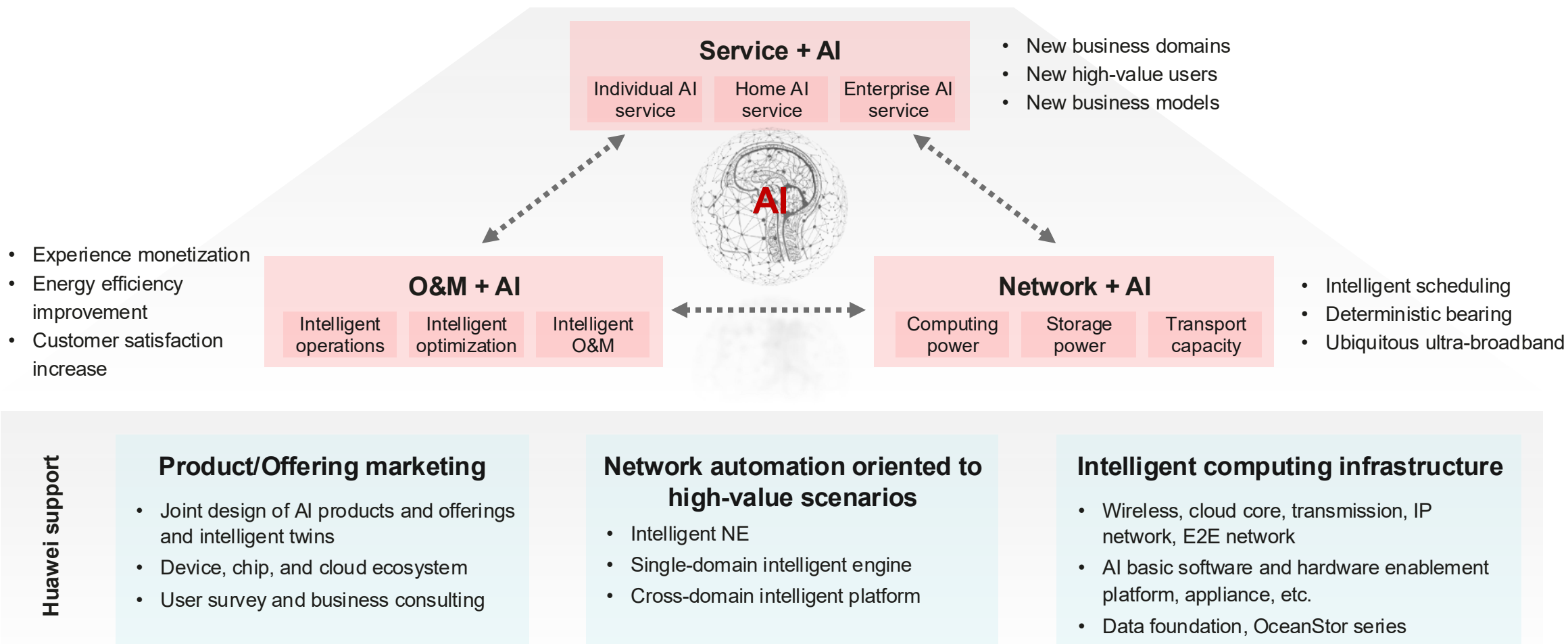
**Algar**



Advance analytics and Gen-AI for automated root cause analysis

MTTR ↓ Network Availability ↑  
Operational efficiency ↑

# AI Brings Opportunities and Challenges to Carriers, and Huawei is Willing to Support to Step into the Intelligent Era



# Thank you.

把数字世界带入每个人、每个家庭、  
每个组织，构建万物互联的智能世界。

Bring digital to every person, home and  
organization for a fully connected,  
intelligent world.

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