

APAC Telecom Radar

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Key Innovations explored

- **SK Telecom: SKT GPUaaS** - An innovative AI cloud service providing scalable GPU resources, accelerating AI development and positioning SK Telecom as a leader in AI infrastructure.
- **Maxis: Mia, Gen AI-Powered Concierge** - A generative AI-powered concierge simplifying B2B customer interactions, enhancing operational efficiency and customer service.
- **Indosat Ooredoo Hutchison: Digital Hub** - A comprehensive digital lifestyle platform to serve as a Hub for various digital services tailored to enhance user convenience and engagement.
- **Bharti Airtel and Bajaj Finance: Digital Financial Platform** - A strategic partnership creating one of India's largest digital platforms for financial services, enhancing digital inclusion and last-mile delivery.
- **KDDI: au Support AI Advisor** - An advanced customer support service using generative AI and digital humans to provide empathetic, user-friendly interactions.
- **SoftBank: Remote Autonomous Driving Support System** - An innovative multimodal AI autonomous driving system, leveraging edge AI to enhance safety and reliability in Level 4 autonomous driving, supporting broader adoption.
- **HKT and Microsoft Hong Kong: Operator Connect** - A pioneering collaboration offering a seamless, AI-enhanced Microsoft Teams Phone solution, revolutionizing enterprise communication in Hong Kong.
- **Taiwan Mobile and BMW Group: 5G "One Number for Car"** - Service offering integrating mobile connectivity into vehicles, transforming them into connected hubs with enhanced communication and entertainment.
- **au PAY: Digital Wage Payment System** - A transformative digital wage payment service expanding salary management options in Japan, offering flexibility and convenience.

1. SK Telecom - SKT GPUaaS

Executive Summary

- SK Telecom launched "SKT GPU-as-a-Service" (SKT GPUaaS) in Jan-2025 at Seoul, enhancing AI cloud services with stable GPU resources to further accelerate its AI development capabilities.
- This on-demand AI cloud service, developed in partnership with Lambda, positions SK Telecom as a key player in the AI infrastructure market, leveraging its advanced GPU technology to meet growing demand for scalable AI solutions.

Market Context and Challenge

- **Industry Challenge:** Growing demand for scalable AI solutions and high-performance GPU resources, facilitated the need for accelerated AI development and innovation.
- **Market Dynamics:** Increasing adoption of AI technologies across industries, with businesses seeking flexible, high-performance GPU resources to support AI development.
- **Strategic Imperatives:** Enhance AI infrastructure and support businesses in accelerating AI innovation through scalable, cost-effective GPU resources.

Innovation Overview

- **Solution Architecture:**
 - SKT GPUaaS enables businesses to rent NVIDIA H100 Tensor Core GPUs, with plans to introduce H200 GPUs in Q1 2025.
 - Hosted at the Gasan AIDC (46MW capacity, 44kW per rack), the service offers customizable packages, including GPU quantity, duration, standalone servers, firewalls, and dedicated lines.

Exhibit 1: SK Telecom's GPU-as-a-service



SK Telecom's CEO, Ryu Young-sang, puts the company's GPU-as-a-service in the frame at the Gasan datacentre.

[Image reference](#)

- **Implementation Approach:**

- Deployment Methodology: On-demand AI cloud service, ensuring flexible and scalable GPU access for businesses.
- Key Partnerships: Collaboration with Lambda, ensuring stable GPU supply and expertise.
- Resource Requirements: Advanced GPU technology and AI infrastructure, ensures high-performance and scalability.

Value Proposition

- **Target Segment:**

- Primary User Base: South Korean businesses, including corporations, startups, and research institutions, needing flexible, high-performance GPU resources for AI development.
- Market Size: Significant demand for scalable AI solutions, driven by the need for accelerated AI development and innovation.
- User Needs Addressed: Flexible, high-performance GPU resources, cost-effective AI development, and accelerated innovation.

- **Competitive Advantage:**

- Unique Features: Pioneering Nvidia H200 Tensor Core technology deployment, for enhancing AI processing capabilities and performance.
- Market Positioning: Positions SKT as a Leader in AI infrastructure, offering cost-effective, scalable GPU access.
- Innovation Elements: AI Cloud Manager integrates multiple GPUs into a single, efficient resource pool, optimizing performance and scalability.
- Entry Barriers: Advanced GPU technology and AI infrastructure, ensuring a competitive edge.

Potential Impact Analysis

- **Quantitative Metrics:**

- Efficiency Gains: Reduced training times and faster AI service deployment, enhancing business growth and innovation.
- Financial Impact: Cost-effective, scalable GPU access, driving business growth and market expansion.

- **Qualitative Outcomes:**

- Customer Experience Improvements: Enhanced AI capabilities and competitiveness, driving business growth and innovation.
- Brand Perception Changes: Strengthened market position as a leader in AI infrastructure.

Future Roadmap

- **Planned Enhancements:** Introduce H200 GPUs in Q1 2025, enhancing AI processing capabilities and performance.
- **Scaling Strategy:** Increase market penetration and adoption amongst domestic clients, leveraging the success of initial deployments.
- **Long-term Vision:** Establish SK Telecom as a leader in AI infrastructure, driving innovation and digital integration in the AI market.

Key Takeaways

- Scalable, cost-effective GPU resources are key to accelerating AI development and innovation.
- Strategic partnerships enhance service offerings and market reach, driving business growth and innovation.
- Critical Success Factors for SK Telecom includes technical expertise, strong partnerships, and a focus on business growth and innovation.

2. Maxis - Mia, Gen AI-Powered Concierge

Executive Summary

- Maxis launched Mia (Maxis Intelligent Assistant), a generative AI-powered concierge in March-2025, to simplify customer experience on the Maxis Business Hub portal for business customers, focusing on roaming service management.
- This service positions Maxis as amongst leading telco in Malaysia for AI innovation, enhancing operational efficiency and customer service for businesses.

Market Context and Challenge

- **Industry Challenge:** Growing demand for efficient, intuitive customer service solutions to enhance operational efficiency and customer satisfaction.
- **Market Dynamics:** Businesses are seeking solutions that offer quick, intuitive support and enhance operational efficiency.
- **Strategic Imperatives:** Leverage AI and digital technologies to enhance customer service and drive operational efficiency across diverse business segments.

Innovation Overview

- **Solution Architecture:**
 - Mia, built on Amazon Bedrock with a leading large language model, provides 24/7 instant roaming support, smart recommendations, and personalized suggestions through conversational AI and workflow automation.
- **Implementation Approach:**
 - Deployment Methodology: Integration of AI and digital technologies into customer service solutions, ensuring seamless user experience and engagement.
 - Key Partnerships: Collaboration with AI technology providers, enhancing service offerings and market reach.
 - Resource Requirements: AI and digital infrastructure, ensuring seamless service delivery and user experience.

Value Proposition

- **Target Segment:**
 - Primary User Base: Maxis Business' B2B clients, including SMEs, large enterprises, and multinationals in Malaysia, reliant on efficient telecom services.

- Market Size: Significant demand for efficient, intuitive customer service solutions, driven by the need for enhanced operational efficiency and customer satisfaction.
- User Needs Addressed: 24X7 quick, intuitive support, enhanced operational efficiency, and personalized suggestions.
- **Competitive Advantage:**
 - Unique Features: Pioneering Gen AI adoption in Malaysia's B2B telecom space, offering contextual intelligence for intuitive, user-focused interactions.
 - Innovation Elements: Leverages AWS's cloud infrastructure, to enhance operational efficiency and customer satisfaction.

Potential Impact Analysis

- **Quantitative Metrics:**
 - Key Performance Indicators: Growth in customer service engagement, satisfaction, and resolution rates.
 - Financial Impact: Strengthens Maxis' position as a leader in AI-driven customer service, driving business growth and market expansion.
- **Qualitative Outcomes:**
 - Customer Experience Improvements: Provides businesses with faster, more intuitive customer experience, enhancing satisfaction.
 - Brand Perception Changes: Strengthened market position as a leader in AI-driven customer service.

Future Roadmap

- Planned Enhancements: Further enhance functionalities and capabilities, to enhance user engagement and satisfaction.
- Scaling Strategy: Increase market penetration and user adoption, leveraging the success of initial deployments.
- Market Expansion Plans: Explore regional and global opportunities, building on the success in Malaysia.

Key Takeaways

- AI and digital technologies are key to enhancing customer service and driving operational efficiency.
- Seamless integration of AI and digital technologies into customer service solutions is essential for maintaining market leadership and competitiveness.

3. Indosat Ooredoo Hutchison - Digital Hub

Executive Summary

- Indosat Ooredoo Hutchison (IOH) launched the "Digital Hub" on its myIM3 and bima+ platforms in Feb-2025, to cater to growing requirement of Digital services by Indonesian citizens.
- It would serve as a Hub for various digital services tailored to enhance user convenience and engagement, thereby supporting IOH's transition into a technology company.

Market Context and Challenge

- **Industry Challenge:** Rising demand for integrated digital services that cater to diverse consumer needs, driven by the increasing digitalization of lifestyles.
- **Market Dynamics:** Consumers are seeking platforms that offer a wide range of services, from entertainment to e-commerce, in a single, convenient interface.
- **Strategic Imperatives:** Leverage digital platforms to enhance user engagement and drive the transition from a traditional telecom provider to a tech-driven lifestyle company.

Innovation Overview

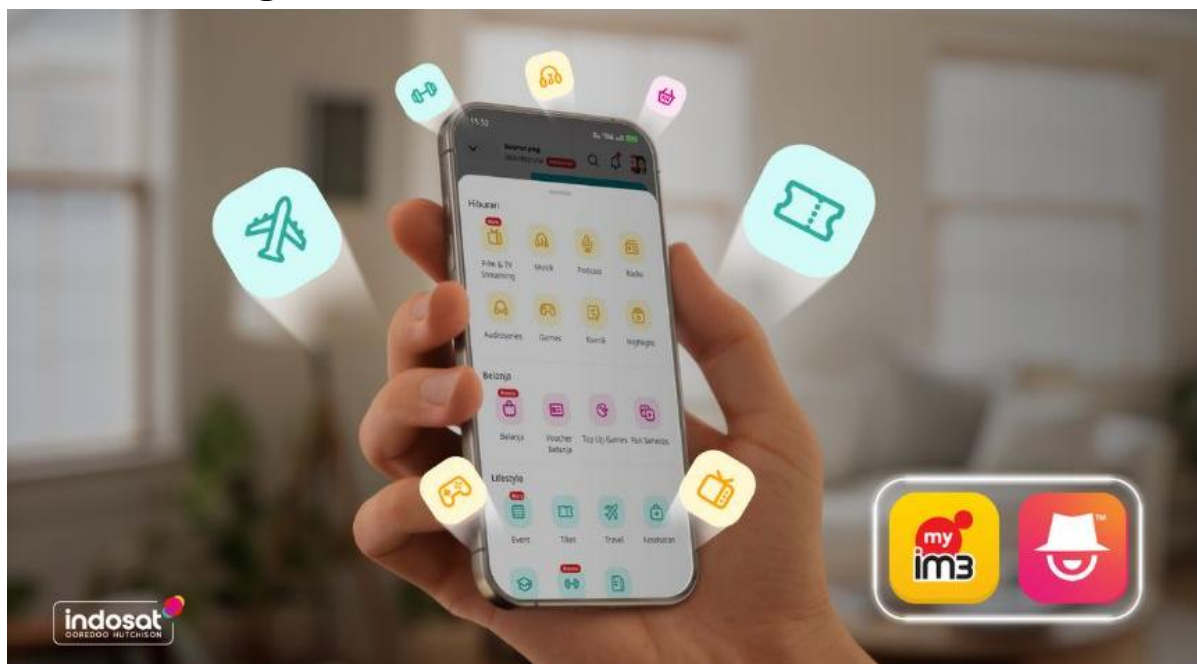
- **Solution Architecture:**
 - The Digital Hub is a unified interface within myIM3 and bima+, offering access to entertainment (e.g., Trebel music streaming), e-commerce (Blibli, Tokopedia), travel (tiket.com), fitness (Celebrity Fitness), and new categories like comics and transportation.
 - Enhanced by AI, it provides a seamless, tailored experience with perks like free data, Celebrity Fitness trial memberships, and discounts on flight and hotel bookings upto IDR 1 million.
- **Implementation Approach:**
 - Deployment Methodology: Integration of diverse services into a single platform, ensuring seamless user experience and engagement.
 - Key Partnerships: Collaboration with service providers like Blibli and tiket.com, for enhancing service offerings and market reach.
 - Resource Requirements: Digital infrastructure and AI capabilities, ensuring seamless service delivery and user experience.

Value Proposition

- **Target Segment:**

- Primary User Base: 50 million monthly active users and 10 million daily active users on myIM3 and bima+, spanning digitally savvy consumers, e-commerce shoppers, travellers, and fitness enthusiasts.
- Market Size: Significant demand for integrated digital services, driven by the need for convenient, comprehensive lifestyle solutions.
- User Needs Addressed: Access to a wide range of digital services, enhanced convenience, and personalized experiences.

Exhibit 2: IOH Digital Hub



Source: [Indosat Ooredoo Hutchison](#)

- **Competitive Advantage:**

- Unique Features: Combines telecom and non-telco services in a single, AI-enhanced hub, offering value-added incentives.
- Market Positioning: Strengthen IOH's positioning as a leader in digital lifestyle services, offering a comprehensive, seamless experience.

Potential Impact Analysis

- **Quantitative Metrics:**

- Key Performance Indicators: Growth in user engagement, service adoption, and customer satisfaction.
- Efficiency Gains: Enhanced convenience and user experience, driving engagement and satisfaction.

- **Qualitative Outcomes:**

- Customer Experience Improvements: Provides added value through perks like free fitness trials and travel discounts up to IDR 1 million.
- Brand Perception Changes: Strengthen IOH's market position as a leader in digital lifestyle services.

Future Roadmap

- Planned Enhancements: Expand service offerings and digital capabilities, enhancing user engagement and satisfaction.
- Scaling Strategy: Increase market penetration and user adoption, leveraging the success of initial deployments.

Key Takeaways

- Integrated digital platforms facilitating seamless integration of diverse services into a single platform is key to enhancing user engagement and driving business growth.

4. Bharti Airtel and Bajaj Finance - Digital Financial Platform

Executive Summary

- Bharti Airtel and Bajaj Finance announced partnership in Jan-2025, to create one of India's largest digital platforms for financial services, merging Airtel's extensive customer base and digital infrastructure with Bajaj Finance's AI-driven financial products.
- This collaboration aims to transform last-mile delivery and promote digital inclusion, enhancing access to financial services for millions across India.

Market Context and Challenge

- **Industry Challenge:** Enhancing access to financial services for underserved populations, driven by the need for digital inclusion and financial empowerment.
- **Market Dynamics:** Increasing demand for digital financial services, with consumers seeking convenient, accessible financial solutions.
- **Regulatory Considerations:** Compliance with financial regulations and data privacy standards is essential to ensure service reliability and customer trust.

Innovation Overview

- **Solution Architecture:**
 - The platform integrates Bajaj Finance's offerings—starting with Gold Loan, Business Loan, a co-branded Insta EMI Card, and Personal Loan—into the Airtel Thanks App till March-2025, expanding to 10 products by year-end.
 - The Insta EMI Card enables flexible payments to Airtel's customers across 1.5 lakh partner stores in 4,000+ cities and e-commerce platforms, with plans to extend access via Airtel's store network.
- **Implementation Approach:**
 - **Deployment Methodology:** Seamless integration of financial products into Airtel's digital ecosystem, ensuring broad accessibility and user engagement. Initial product integration began in Mar-2025, with expansion to 10 products by year-end.
 - **Key Partnerships:** Collaboration with Bajaj Finance, leveraging their financial expertise and product portfolio.
 - **Resource Requirements:** Digital infrastructure and customer support, ensuring seamless service delivery and user experience.

Value Proposition

- **Target Segment:**

- Primary User Base: Airtel's 375 million customers, from urban consumers to rural new-to-credit individuals, plus SMEs and merchants within Bajaj Finance's 5,000+ branches and 70,000 field agents.
- Market Size: Significant demand for digital financial services, driven by the need for convenient, accessible financial solutions.

- **Competitive Advantage:**

- Unique Features: Combines Airtel's vast customer base and digital platforms with Bajaj Finance's 27-product portfolio and 5,000+ branch network.
- Market Positioning: Leader in digital financial services, offering a seamless, secure experience via the Airtel Thanks App and physical stores, with focus on last-mile delivery and financial inclusion.

Potential Impact Analysis

- **Quantitative Metrics:**

- Key Performance Indicators: Growth in digital financial service adoption, customer engagement, and financial inclusion.
- Financial Impact: Strengthens Airtel Finance as a one-stop financial hub, driving business growth and market expansion.

- **Qualitative Outcomes:**

- Customer Experience Improvements: Empowers new-to-credit customers with options like gold loans and EMI cards, enhancing financial inclusion.
- Brand Perception Changes: Strengthened market position as a leader in digital financial services.

Future Roadmap

- Planned Enhancements: Expand product offerings and digital capabilities, enhancing service reach and user engagement.
- Scaling Strategy: Increase market penetration and customer adoption, leveraging the success of initial deployments.

Key Takeaways

- Digital platforms are key to expanding financial service reach and driving financial inclusion.
- Seamless integration of financial products into digital ecosystems is essential for maintaining market leadership and competitiveness.

5. KDDI - au Support AI Advisor

- KDDI launched "au Support AI Advisor" in Mar - 2025, an online customer support service integrating generative AI and digital humans to enhance customer support with user-friendly interactions.
- This service enhances convenience by combining voice, text, and visual responses, to offer customers with quick and intuitive support, thereby enhancing customer satisfaction and engagement.

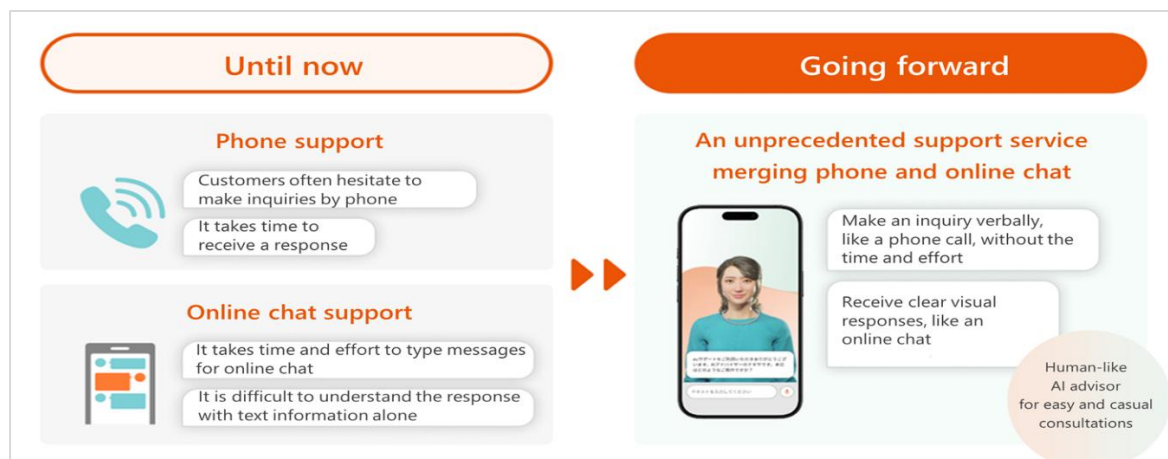
Market Context and Challenge

- **Industry Challenge:** Increasing demand for efficient, empathetic customer support solutions that enhance user experience and satisfaction.
- **Market Dynamics:** Consumers are seeking quick, intuitive support solutions that offer convenience and ease of use.
- **Regulatory Considerations:** Compliance with customer service standards and data privacy regulations is essential to ensure service reliability and customer trust.
- **Strategic Imperatives:** Leverage AI and digital technologies to enhance customer support and drive customer satisfaction across diverse segments.

Innovation Overview

- **Solution Architecture:**
 - The service employs generative AI to interpret inquiries and delivers responses via a digital human avatar, "Nagisa," with human-like expressions and voice.
 - Features include voice/text input, audio readouts, and visual aids, initially supporting Ponta points inquiries on smartphones.

Exhibit 3: KDDI's au Support AI Advisor - Nagisa



Source: [KDDI](#)

- **Implementation Approach:**

- Deployment Methodology: Integration of AI and digital human technologies into customer support services, ensuring seamless user experience and engagement.
- Resource Requirements: AI and digital infrastructure, ensuring seamless service delivery and user experience.

Value Proposition

- **Target Segment:**

- Primary User Base: au's subscribers, focusing on smartphone users seeking quick, intuitive support.
- Market Size: Significant demand for efficient, empathetic customer support solutions, driven by the need for enhanced user experience and satisfaction.
- User Needs Addressed: Quick, intuitive support, enhanced convenience, and personalized experiences.

- **Competitive Advantage:**

- Unique Features: Digital human interface merges AI accuracy with empathetic, human-like interaction.
- Market Positioning: Position KDDI as a leader in AI-driven customer support, offering a seamless, intuitive experience.
- Innovation Elements: Multi-modal support combines voice, text, and images for a richer, stress-free experience.

Potential Impact Analysis

- **Quantitative Metrics:**

- Key Performance Indicators: Growth in customer support engagement, satisfaction, and resolution rates.
- Efficiency Gains: Enhanced convenience and user experience, driving engagement and satisfaction.
- Financial Impact: Strengthens KDDI's position as a leader in AI-driven customer support, driving business growth and market expansion.

- **Qualitative Outcomes:**

- Customer Experience Improvements: Enables customers to resolve issues quickly and stress-free, enhancing satisfaction.
- Market Response: Positive reception from customers and businesses, driving adoption and satisfaction.

Future Roadmap

- **Planned Enhancements:** Service currently support inquiries from smartphones related to Ponta points, The telco plans to expand the service to cover all inquiry topics related to au services in FY-2025.
- **Scaling Strategy:** Increase market penetration and user adoption, leveraging the success of initial deployments.

Key Takeaways

- AI and digital technologies are key to enhancing customer support and driving customer satisfaction.
- Seamless integration of AI and digital human technologies into customer support services is essential for maintaining market leadership and competitiveness.

6. SoftBank - Remote Autonomous Driving Support System

Executive Summary

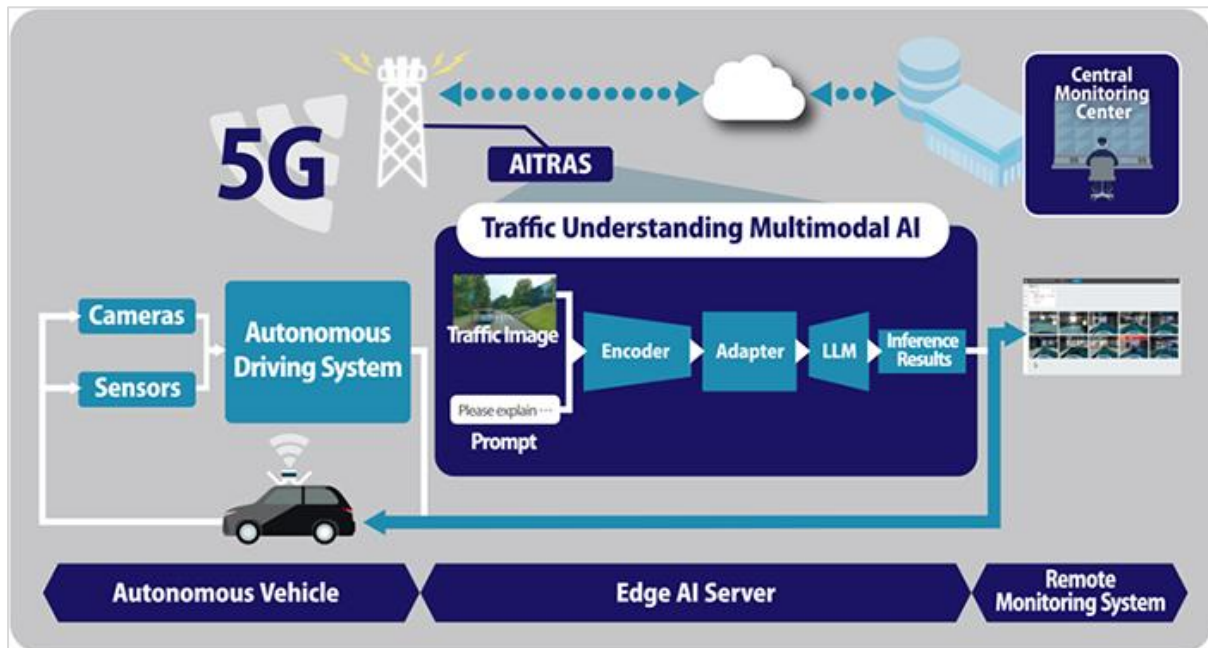
- SoftBank announced the development of its “Remote autonomous driving support system” operating on the AITRAS edge AI server, to advance Level 4 autonomous driving in Mar - 2025.
- This system enhances safety by providing remote support during vehicle malfunctions or unexpected scenarios, supporting broader adoption of autonomous driving.

Market Context and Challenge

- **Industry Challenge:** Growing demand for safe, reliable autonomous driving solutions that enhance operational efficiency and safety.
- **Market Dynamics:** Autonomous vehicle operators and manufacturers are seeking solutions that offer enhanced safety and operational reliability.
- **Regulatory Considerations:** Compliance with autonomous driving standards and safety regulations is essential to ensure service reliability and customer trust.

Innovation Overview

- **Solution Architecture:**
 - The system transmits real-time footage from an autonomous vehicle’s front-facing camera over a 5G network to the AITRAS edge AI server, powered by an NVIDIA GPU and DeepStream SDK.
 - Perception AI instantly analyses obstacles and road conditions, sending driving instructions back to the vehicle.
 - Integrated with “traffic understanding multimodal AI,” trained on Japanese traffic data, it addresses complex scenarios.
- **Implementation Approach:**
 - Deployment Methodology: Integration of edge AI and 5G technologies into autonomous driving systems, ensuring seamless operation and safety.
 - Timeline: Tested in Feb - 2025 at Keio University’s Shonan Fujisawa Campus (SFC) with the OMAE Laboratory.
 - Resource Requirements: AI and digital infrastructure, ensuring seamless service delivery and operational efficiency.

Exhibit 4: SoftBank Multimodal AI Autonomous Driving System

Source: [SoftBank](#)

Value Proposition

- **Target Segment:**

- Primary User Base: Autonomous vehicle operators, manufacturers, and mobility service providers in Japan, particularly those implementing Level 4 autonomy.
- Market Size: Significant demand for safe, reliable autonomous driving solutions, driven by the need for enhanced operational efficiency and safety.
- User Needs Addressed: Enhanced safety, operational efficiency, and reliability in autonomous driving.

- **Competitive Advantage:**

- Unique Features: Leverages AITRAS and 5G for low-latency, real-time support, reducing onboard processing demands.
- Innovation Elements: Combines perception AI with traffic-savvy multimodal AI, trained on Japanese regulations and risks, for contextual decision-making.

Potential Impact Analysis

- **Quantitative Metrics:**

- Key Performance Indicators: Growth in autonomous driving support system adoption, safety improvements, and operational efficiency.
- Financial Impact: Strengthens SoftBank's position as a leader in autonomous driving support systems, driving business growth and market expansion.

- **Qualitative Outcomes:**

- Customer Experience Improvements: Successfully enabled safe stops in malfunction scenarios, e.g., navigating curves with obstacles.
- Brand Perception Changes: Strengthened market position as a leader in autonomous driving support systems.

Future Roadmap

- Planned Enhancements: Expand system capabilities and digital infrastructure, enhancing safety and operational efficiency.
- Market Expansion Plans: Explore regional and global opportunities, building on the success in Japan.

Key Takeaways

- AI and digital technologies are key to enhancing safety and operational efficiency in autonomous driving.
- Seamless integration of AI and digital technologies into autonomous driving systems is essential for maintaining market leadership and competitiveness.
- Critical Success Factors includes Advanced AI and digital capabilities, extensive user base, and a focus on safety and operational efficiency.

7. HKT and Microsoft Hong Kong - Operator Connect

Executive Summary

- HKT, in partnership with Microsoft Hong Kong, launched Operator Connect in Feb - 2025, a next-generation Microsoft Teams Phone solution for enterprises, offering a seamless, operator-managed communication service.
- This collaboration positions HKT as the first local provider in Hong Kong to offer this service, significantly enhancing business communications and digital transformation efforts with AI-powered features, improving call quality, operational efficiency, and overall productivity.

Market Context and Challenge

- **Industry Challenge:** Enterprises require reliable, future-proof communication platforms to support digital transformation and maintain competitive advantage.
- **Market Dynamics:** There is an increasing demand for Unified Communication-as-a-Service (UCaaS) solutions, driven by the need for seamless, integrated communication tools.
- **Strategic Imperatives:** Leveraging AI to enhance service quality and customer satisfaction is crucial for maintaining market leadership.

Innovation Overview

- **Solution Architecture:**
 - Integrates existing business phone lines with Microsoft Teams, requiring no significant hardware upgrades or changes.
 - AI-driven HKT Operator Connect Plus monitors call quality, automatically alerts users to issues, and identifies root causes of voice fluctuations.
- **Implementation Approach:**
 - Deployment Methodology: Integration with existing systems, ensuring minimal disruption to business operations.
 - Key Partnerships: Collaboration with Microsoft Hong Kong, leveraging their industry-leading technology.
 - Resource Requirements: Technical integration and support infrastructure, including comprehensive end-to-end support and a dedicated hotline for troubleshooting.

Value Proposition

- **Target Segment:**
 - Primary User Base: Enterprises in Hong Kong and the region, particularly those seeking reliable, future-proof communication platforms.
 - Market Size: Growing demand for UCaaS solutions, driven by the need for digital transformation and enhanced communication capabilities.
- **Competitive Advantage:**
 - Unique Features: AI-powered call quality monitoring and root-cause analysis, enhancing the standard offering.
 - Market Positioning: First local provider of Microsoft Operator Connect, combining Microsoft's technology with HKT's carrier-grade network and local expertise.

Potential Impact Analysis

- **Quantitative Metrics:**
 - Key Performance Indicators: Call quality improvements, adoption rates, and operational efficiency gains.
 - Financial Impact: Cost-effective transition to cloud-based communication, minimizing the need for extensive hardware changes.
- **Qualitative Outcomes:**
 - Customer Experience Improvements: Enhanced voice services and consistent call quality, leading to improved customer satisfaction.
 - Market Response: Positive reception from enterprises, with strong adoption and demand for the service.

Future Roadmap

- Planned Enhancements: Further development of AI features to enhance service quality and customer satisfaction.
- Market Expansion Plans: Explore regional market opportunities, building on the success in Hong Kong.

Key Takeaways

- Strategic partnerships with industry leaders can accelerate innovation and market adoption.
- Seamless integration with existing systems is critical for successful deployment and adoption.

8. Taiwan Mobile and BMW Group - 5G "One Number for Car"

Executive Summary

- Taiwan Mobile and BMW Group launched Taiwan's first 5G "One Number for Car" service in Mar - 2025, by integrating mobile connectivity into vehicles, transforming them into connected hubs with enhanced communication and entertainment capabilities.
- This service marks a pioneering step in smart mobility, positioning Taiwan Mobile as a leader in integrating telecom services with automotive technology.

Market Context and Challenge

- **Industry Challenge:** Growing demand for integrated connectivity and entertainment in vehicles, driven by consumer expectations for smart mobility solutions.
- **Market Dynamics:** Increasing adoption of smart mobility solutions, with consumers seeking seamless integration of their digital lives into their vehicles.
- **Strategic Imperatives:** Enhance user experience and drive smart mobility adoption through innovative telecom-automotive integration.

Innovation Overview

- **Solution Architecture:**
 - Personal eSIM technology extends users' existing numbers into BMW models, enabling calls and data usage in select vehicles.
 - Features include an in-car Wi-Fi hotspot for up to 10 devices and access to streaming platforms like Netflix and Disney+ via the optional Theatre Screen.
- **Implementation Approach:**
 - Deployment Methodology: Activation via My BMW App or in-car screen, ensuring a seamless user experience.
 - Key Partnerships: Collaboration with BMW Group, leveraging their automotive expertise.
 - Resource Requirements: Telecom and automotive integration, ensuring seamless connectivity and user experience.

Value Proposition

- **Target Segment:**
 - Primary User Base: BMW owners in Taiwan, particularly tech-savvy drivers and passengers seeking integrated connectivity and entertainment.

- Market Size: Significant demand for smart mobility solutions, driven by consumer expectations for seamless digital integration.
- User Needs Addressed: Integrated connectivity, entertainment, and seamless digital integration in vehicles.
- **Competitive Advantage:**
 - Unique Features: First in Taiwan to offer mobile number integration in vehicles via 5G and personal eSIM technology.
 - Innovation Elements: Seamless ecosystem linking user identity across BMW vehicles with a single number.

Potential Impact Analysis

- **Quantitative Metrics:**
 - Key Performance Indicators: Adoption rates, user engagement, and service reach.
 - Efficiency Gains: Simplified access and connectivity, enhancing user experience and satisfaction.
- **Qualitative Outcomes:**
 - Customer Experience Improvements: Enhanced in-car entertainment and connectivity, transforming vehicles into entertainment hubs.
 - Brand Perception Changes: Strengthened market position as a leader in smart mobility solutions.

Future Roadmap

- Planned Enhancements: Expand service compatibility with more BMW models, enhancing user flexibility and service reach.
- Scaling Strategy: Increase market penetration and user adoption, leveraging the success of initial deployments to further strengthen Taiwan Mobility strategy, driving the convergence of telecom and smart mobility.

Key Takeaways

- Integration of telecom and automotive technologies is key to smart mobility and digital integration.
- Seamless user experience drives adoption and satisfaction, enhancing brand reputation and market position.
- Strategic partnerships enhance service offerings and market reach, driving business growth and innovation.

9. au PAY - Digital Wage Payment System

Executive Summary

- au Payment, part of the KDDI Group, launched "au PAY Salary Receipt," a digital wage payment service enabling employees to receive salaries via the au PAY smartphone app.
- The service expands payment options beyond cash and bank accounts, marking a significant shift in Japan's financial landscape and enhancing salary management flexibility.

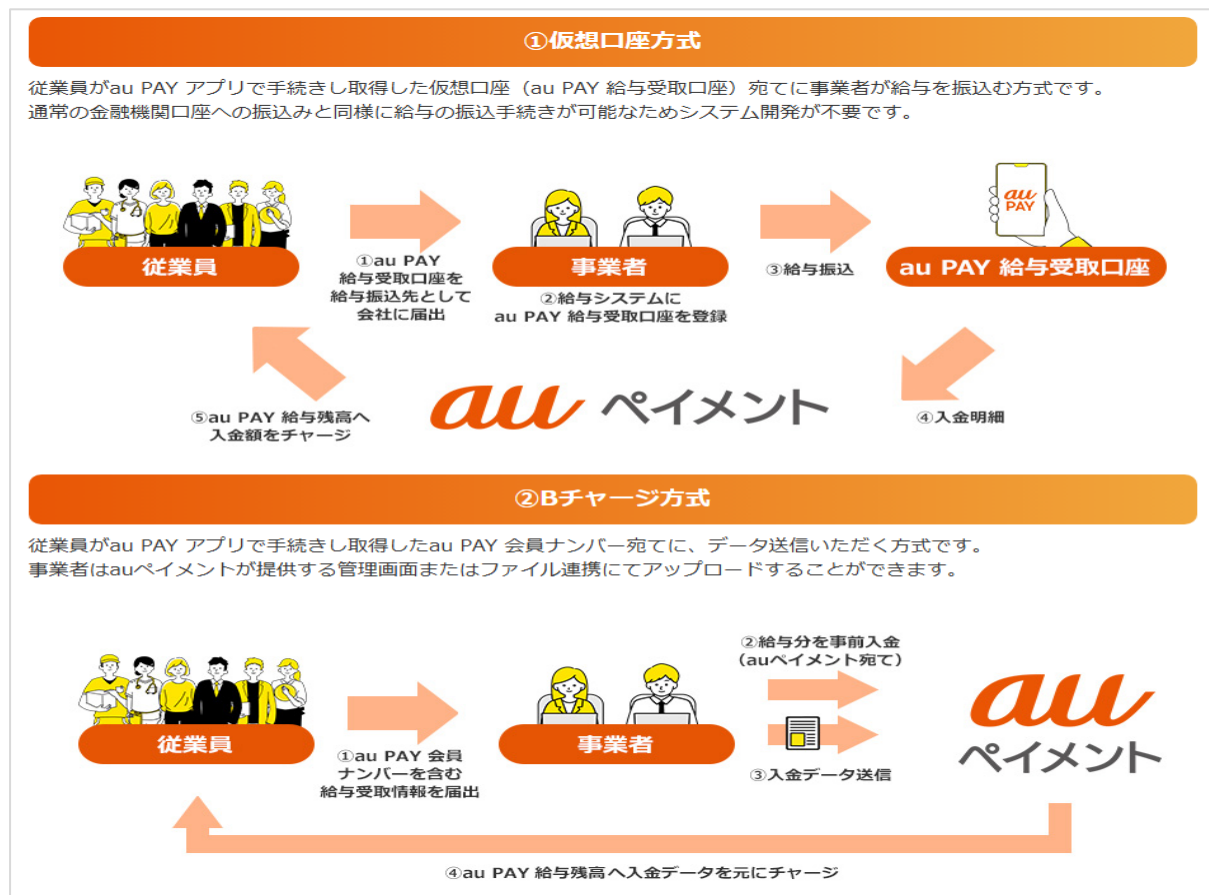
Market Context and Challenge

- **Industry Challenge:** Growing demand for flexible, digital payment solutions that cater to diverse employee needs, driven by the increasing digitalization of financial services.
- **Market Dynamics:** Consumers are seeking convenient, accessible financial solutions that offer flexibility and ease of use.
- **Regulatory Considerations:** Compliance with financial regulations and data privacy standards is essential to ensure service reliability and customer trust.

Innovation Overview

- **Solution Architecture:**
 - "au PAY Salary Receipt" offers two methods: Virtual Account Method and B Charge Method, supporting varied business payroll systems with seamless integration.
 - Enhanced by AI and integrated with au PAY, it caps the salary balance at ¥100,000, with excess auto-transferred to a linked bank account fee-free.
- **Implementation Approach:**
 - Deployment Methodology: Integration of digital wage payment options into the au PAY app, ensuring seamless user experience and engagement.
 - Key Partnerships: Collaboration with KDDI Group companies, enhancing service offerings and market reach.
 - Resource Requirements: Digital infrastructure and AI capabilities, ensuring seamless service delivery and user experience.

Exhibit 5: KDDI au PAY Salary Receipt implementation method

Source: [KDDI](#)

Value Proposition

• Target Segment:

- Primary User Base: au PAY's identity-verified users (millions across Japan), initially KDDI Group employees (~60,000+ potential users), with plans to expand to all au PAY users.
- Market Size: Significant demand for digital financial services, driven by the need for convenient, accessible financial solutions.
- User Needs Addressed: Access to flexible financial options, digital inclusion, and financial empowerment.

• Competitive Advantage:

- Unique Features: First major Japanese telecom-linked service for digital salary payments, offering dual-method flexibility.
- Market Positioning: Positions KDDI as a leader in digital financial services, offering a seamless, secure experience via the au PAY app.

- Innovation Elements: Supports varied business payroll systems with seamless integration, enhancing accessibility and convenience.
- Entry Barriers: Extensive user base and digital infrastructure, ensuring a competitive edge.

Potential Impact Analysis

- **Quantitative Metrics:**

- Key Performance Indicators: Growth in digital wage payment adoption, customer engagement, and financial inclusion.
- Efficiency Gains: Enhanced access to financial services for millions, including in remote areas, driving digital inclusion and financial empowerment.
- Financial Impact: Strengthens au PAY's position as a leader in digital financial services, driving business growth and market expansion.

- **Qualitative Outcomes:**

- Customer Experience Improvements: Expands salary receipt options for employees beyond traditional methods, enhancing financial inclusion.
- Brand Perception Changes: Strengthened market position as a leader in digital financial services.

Future Roadmap

- Planned Enhancements: Expand product offerings and digital capabilities, enhancing service reach and user engagement.
- Scaling Strategy: Increase market penetration and customer adoption, leveraging the success of initial deployments.

Key Takeaways

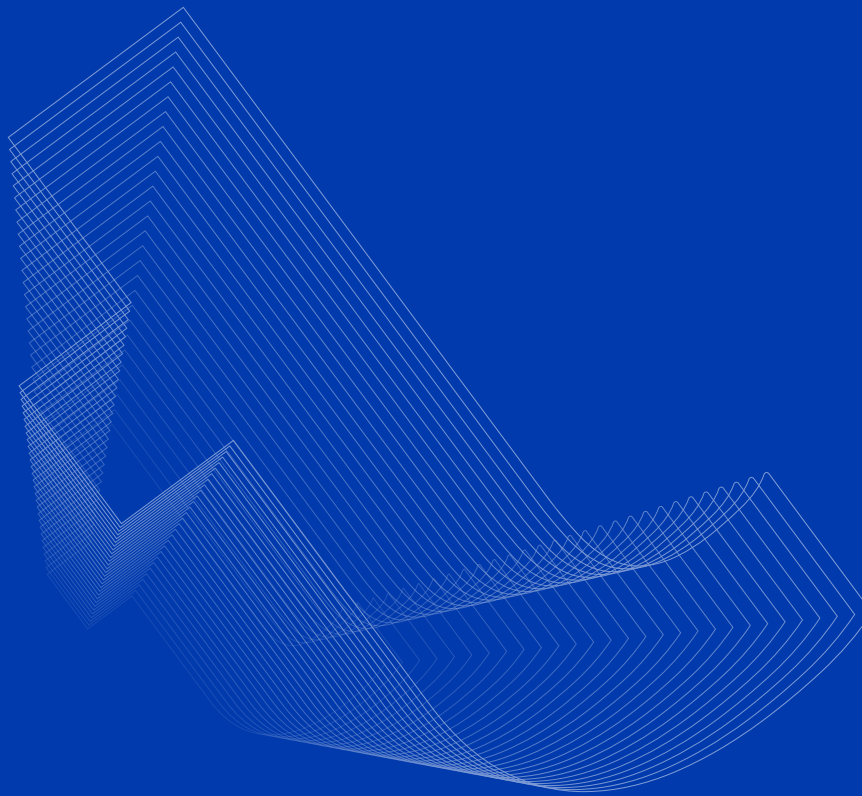
- Digital platforms are key to expanding financial service reach and driving financial inclusion.
- Seamless integration of financial products into digital ecosystems is essential for maintaining market leadership and competitiveness.

Research Methodology and Assumptions

- “APAC Telecom Radar – Spring 2025” delves into notable innovations by telecommunications providers that have disrupted their respective markets, within the Asia-Pacific region during the period Jan - Mar 2025.
- The report primarily highlights key advancements and company announcements across various areas, including AI, 5G, IoT, XR, Quantum computing, security, bundled service offerings and customer experience.
- These case studies provide actionable insights and potential pathways for telcos aiming to adapt these innovations to their markets.
- This report also offers insights into companies leading the innovation charge, aimed at assisting business executives and technology leaders in shaping their own innovation strategies and future-focused projects.
- The data presented in this report is based on the most current information available at the time of compilation. As such, it may not reflect subsequent developments. This report is intended for informational purposes only and should not be relied upon as a substitute for independent research.

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