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# The Mobile Economy North America 2026



# GSMA

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# Executive summary

## Creating value from extensive network investments

As 5G standalone (5G SA) and 5G-Advanced mature, mobile connectivity is increasingly becoming strategic infrastructure for AI, cloud services, industrial automation and new enterprise applications in North America.<sup>1</sup> Continued investment in mobile networks will be critical to improve productivity, strengthen resilience and maintain the region's long-term competitiveness.

Mobile technologies are already helping businesses improve efficiency and develop new services. In 2025, mobile technologies and services generated \$1.9 trillion in economic value across North America, equivalent to 5.8% of regional GDP. The mobile ecosystem supported 2.8 million jobs and contributed \$170 billion in tax revenues. By 2030, mobile's economic contribution is forecast to reach \$3.7 trillion, driven by the growing use of 5G, IoT, cloud and AI across the economy.

With the first phase of the 5G investment cycle largely complete, operators are shifting their focus from expanding coverage to generating returns from the infrastructure deployed. Fixed wireless access (FWA) has emerged as the clearest, at-scale monetisation model. Satellite connectivity is also increasingly being integrated with mainstream mobile services, while operators are moving further into the AI value chain by connecting data centres, investing in compute infrastructure, embedding AI in networks and developing enterprise services.

The mobile industry also continues its work advancing digital inclusion, community resilience and environmental sustainability. Operators are combining affordable connectivity with devices, digital skills training and community support to address barriers to meaningful participation in the digital economy.

## \$1.9tn



**In 2025, mobile technologies and services contributed \$1.9 trillion or 5.8% of the region's GDP**

## 2.8m jobs



**In 2025, mobile technologies and services supported 1.4 million direct jobs and a further 1.4 million indirect jobs in the region**

1. This report defines North America as the US and Canada. For analysis including the Caribbean, please see The Mobile Economy Caribbean and The Mobile Economy Latin America.

# Key trends shaping the mobile ecosystem

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## 5G monetisation

From rollout to returns

5G strategy in North America is shifting from rollout to returns. FWA provides the clearest proof of monetisation, while 5G SA and 5G-Advanced are creating targeted opportunities through slicing, APIs and RedCap.

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## Satellite connectivity

Towards integrated extension of mobile networks

Direct-to-device (D2D) satellite connectivity is moving from emergency messaging to an integrated extension of mobile networks. Operators and satellite providers are pursuing multiple models, including terrestrial mobile spectrum, dedicated mobile-satellite spectrum and wholesale satellite access arrangements.

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## AI

Moving up the value chain

Operators are supporting AI workloads, embedding AI in networks and developing enterprise/consumer AI services. In the US, the focus is largely on using fibre, edge and network assets to connect into the hyperscaler ecosystem. In Canada, operators are also investing in sovereign AI infrastructure and domestic compute capacity.



# Policies for growth and innovation

Early access to key spectrum bands has supported North America's leadership in 5G. The US recently restored the FCC's auction authority and established an 800 MHz commercial spectrum pipeline. The US and Canada have moved swiftly on regulatory frameworks for D2D satellite services.

Looking ahead, the region will require a coordinated roadmap across low-, mid- and high-band spectrum, with additional mid-band capacity needed for

5G-Advanced and future 6G services. Low-band spectrum will remain essential for coverage and digital inclusion.

**The region will require a coordinated roadmap across low-, mid- and high-band spectrum**



# The Mobile Economy North America



## State of mobile internet connectivity

2025

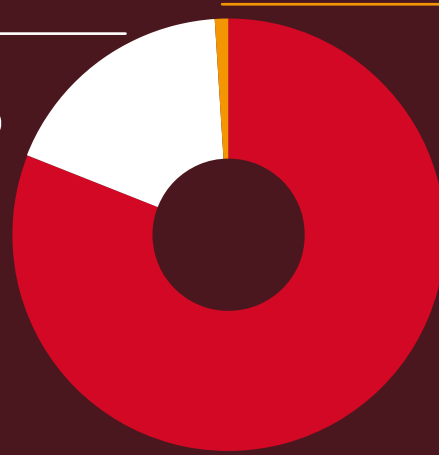
While 312 million people are connected in North America, 68 million live within mobile broadband coverage but do not use mobile internet (the usage gap).

The digital inclusion challenge that remains is about spurring meaningful use of mobile internet services.

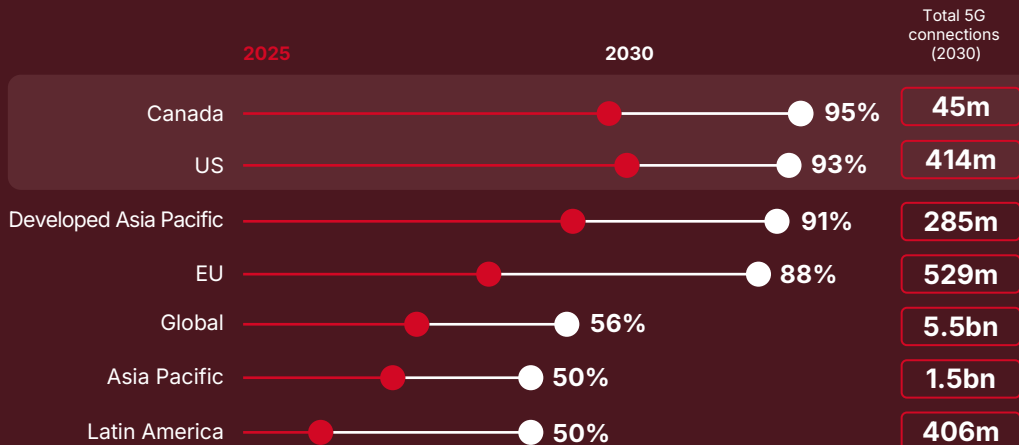
Usage gap  
**18%**

Coverage gap  
**1%**

Connected  
**81%**



## 5G as a share of total connections



Over

**90%**

The US and Canada are already at mass-market levels of 5G adoption. By 2030, 5G is expected to account for more than 90% of connections.



## Operator revenues and investment

Revenues

2025

**\$331bn**

2030

**\$359bn**

Investment

Capex for the period 2025–2030

**\$298bn**



## GSMA Open Gateway API deployments

**6 operators**

with deployments  
across US and Canada

As of June 2026

# 01

## The economic impact of the mobile industry



# 1.1

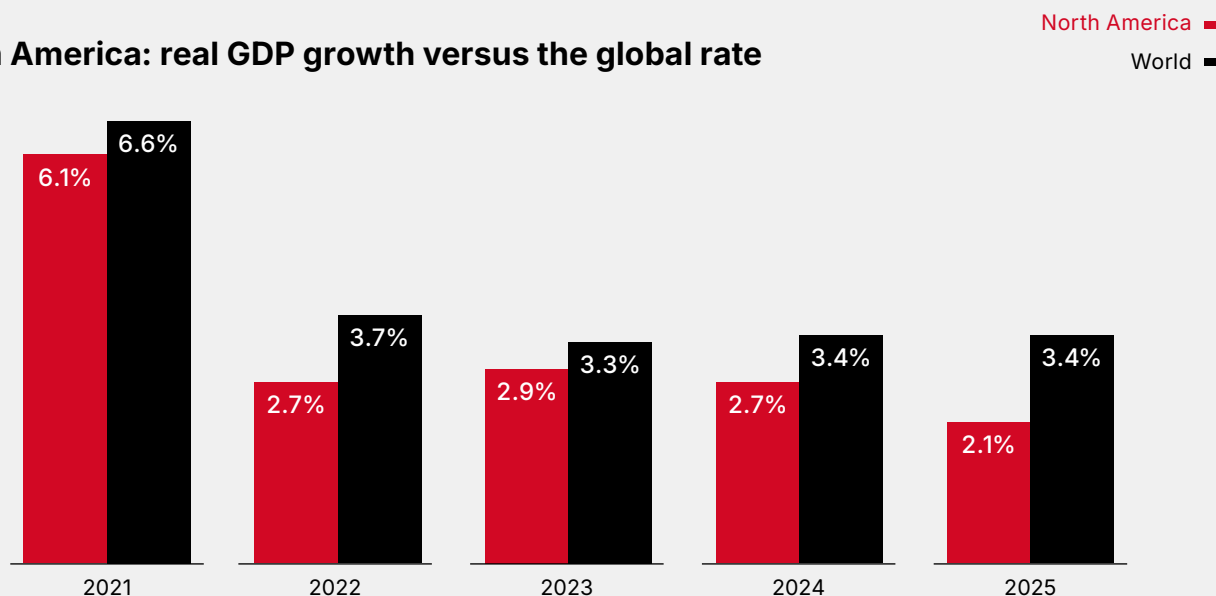
## Macroeconomic outlook

The North American economy continued to expand in 2025, though growth moderated to 2.1% due to tighter financial conditions, increased geopolitical risks and more restrictive trade policies. Recent growth has been underpinned primarily by private consumption and public spending. The outlook remains uncertain. Lower net migration, labour market pressures and higher borrowing costs continue to constrain productive capacity. Fiscal pressures also remain, limiting the space for policy support and increasing the need to prioritise investment that can raise long-term productivity.

North America remains one of the world's leading digital economies. Its advanced technology ecosystem, strong research base and large digital industries provide the foundation for continued innovation and competitiveness. In recent years, digital and technology-related sectors have been important sources of economic strength, particularly as AI adoption, cloud computing, cybersecurity and advanced connectivity continue to expand.

Figure 1

### North America: real GDP growth versus the global rate



Source: GSMA Intelligence using WEO-IMF April 2026 data

## Technology investments underpin economic growth

Technology is an engine of economic growth, and North America remains at the frontier of digital technology development. Large-scale investments in AI infrastructure, cloud capacity and data centres reinforce the region's position as a global leader in the digital economy.

For example, the Stargate project, led by OpenAI, Oracle and SoftBank, includes plans to invest up to \$500 billion over four years to build AI infrastructure in the US. In Canada, Microsoft has announced a CAD19 billion investment for 2023–2027 to expand cloud and AI infrastructure, strengthen digital sovereignty, improve cybersecurity and support

digital skills. Such commitments highlight the scale of investment required to support the next wave of AI-enabled growth.

The mobile sector plays a transformative role in North America by providing the fast, reliable and secure connectivity that underpins the digital economy. With a highly skilled population and advanced technology infrastructure, the region is well placed to benefit from mobile-enabled technologies. As 5G networks mature and the adoption of IoT, cloud services and AI accelerates, mobile connectivity will support efficiency gains, innovation and productivity improvements across the economy.

# 1.2

## Mobile's contribution to the economy

### Mobile technologies contributed \$1.9 trillion of economic value in 2025

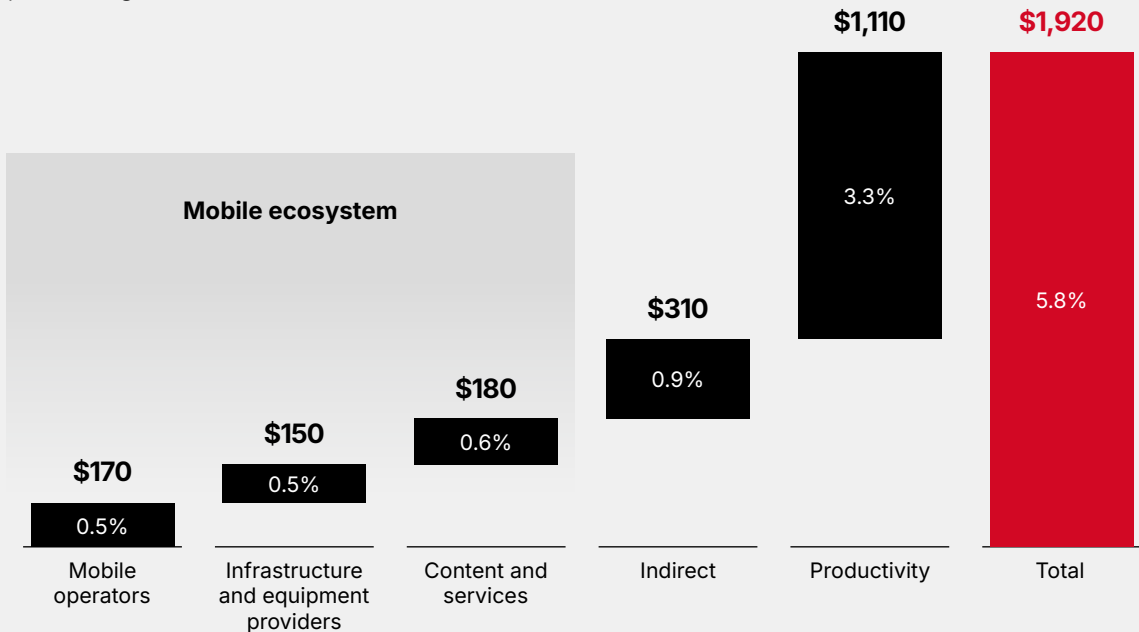
In 2025, mobile technologies and services generated 5.8% of GDP across North America – a contribution that amounted to \$1.9 trillion of economic value added. The greatest benefits came from productivity effects reaching \$1.1 trillion, followed by the direct contribution of the mobile ecosystem generating \$500 billion.

The impacts of mobile technologies include connectivity and digital transformation. The former refers to the use of mobile technologies. The latter involves the integration by enterprises of technologies enabled by mobile infrastructure such as IoT, edge computing and AI.

The mobile ecosystem comprises three categories: mobile operators, infrastructure and equipment, and content and services. The infrastructure and equipment category encompasses tower companies, network equipment providers, device manufacturers and IoT suppliers. Meanwhile, the content and services category encompasses content, mobile application and service providers, distributors and retailers, and mobile cloud services.

Figure 2  
**North America: economic contribution of mobile, 2025**

Billion, percentage of GDP



Note: Totals may not add up due to rounding.  
Source: GSMA Intelligence

## Mobile's economic contribution will reach \$3.7 trillion by 2030

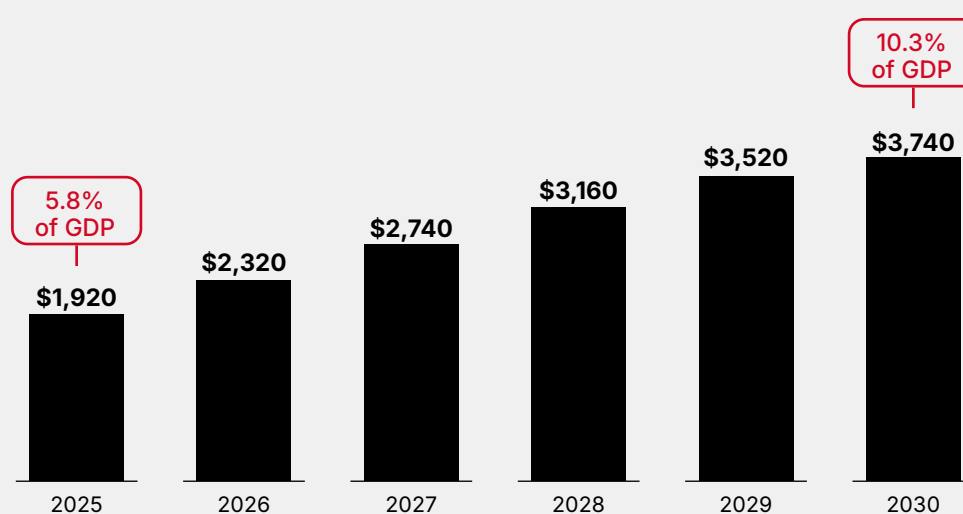
By 2030, mobile's contribution to the North American economy will reach \$3.7 trillion, driven by the productivity and efficiency gains enabled by the continued expansion of mobile services and the growing adoption of digital technologies. Between 2025 and 2030, mobile's contribution is expected to grow at a CAGR of 14.3% – around seven times faster than expected growth in regional GDP over the same period (2.0%). This suggests the next wave of growth will depend less on expanding labour or capital inputs, and more on using digital technologies to raise efficiency across the economy.

Mobile-enabled technologies can help address weak productivity growth in advanced economies by improving the use of existing resources. Through 5G, IoT, cloud services and AI, firms can automate routine processes, raise labour productivity and make better use of real-time data. The technologies can also support the creation of new business models and markets, helping North America translate digital leadership into sustained economic growth.

Figure 3

### North America: the economic impact of mobile to 2030

Billion



Source: GSMA Intelligence

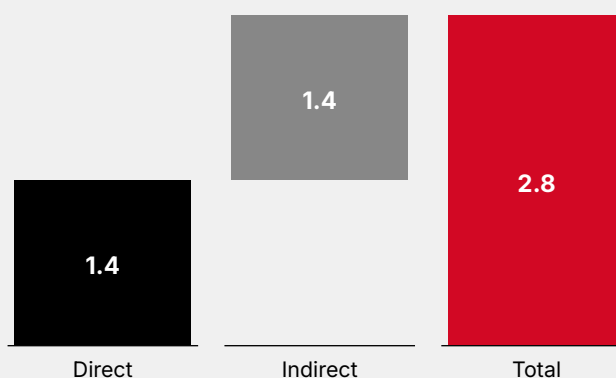
## The mobile ecosystem in North America supported 2.8 million jobs in 2025

Mobile operators and the wider mobile ecosystem provided direct employment to 1.4 million people in North America in 2025. In addition, the economic activity in the ecosystem generated a further 1.4 million jobs in other sectors, meaning 2.8 million jobs were directly or indirectly supported.

Figure 4

### North America: employment impact of mobile, 2025

Jobs, million



Source: GSMA Intelligence

# The fiscal contribution of the mobile ecosystem reached \$170 billion in 2025

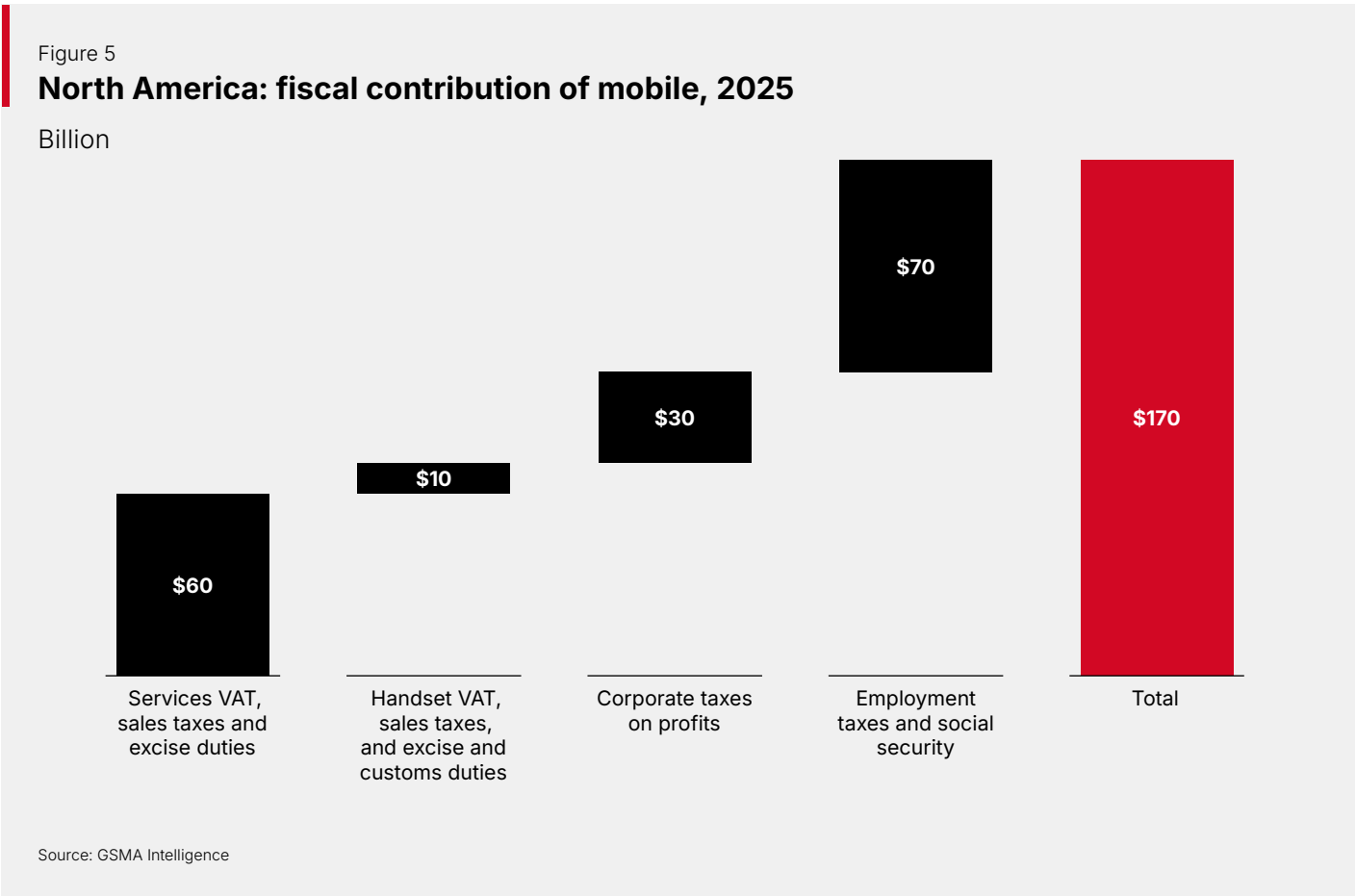
Taxes constitute the major share of government revenues around the world. In 2025, tax revenue in North America reached \$6.6 trillion, or 20% of regional GDP, which was similar to the previous year.

The mobile sector in North America made a substantial contribution to the funding of the public sector, with \$170 billion raised through taxes on the sector in 2025. A large contribution was driven by employment taxes and social security (\$70 billion).

In a region with relatively mature tax systems and high levels of digital adoption, the key opportunity is to improve efficiency, reduce compliance costs and adapt tax revenue systems to an increasingly digital and platform-based economy. Mobile-enabled services can make it easier for individuals

and businesses to file taxes, make payments and interact with public authorities, while helping tax administrations improve service delivery and reduce administrative burdens.

The expansion of digital payments, e-commerce and app-based services can increase transaction traceability and support more effective revenue collection. This is particularly relevant in North America, where a large share of economic activity is increasingly digital, data-intensive and cross-border. By supporting more secure and transparent transactions, mobile technologies can help tax systems keep pace with changing business models, reduce compliance gaps and strengthen the resilience of public revenues.



# The contribution of 5G and its ecosystem

As 5G networks expand and complementary technologies such as AI continue to mature, the scale of impact will be shaped not just by infrastructure availability but also investment in digital skills, innovation capacity and the integration of advanced technologies into production processes.

The economic value of digital transformation will come from two main channels:

- **external value creation** – the creation of new revenue streams and business models that expand markets and stimulate additional demand
- **internal value enhancement** – measurable gains in productivity, cost efficiency and operational performance within firms.

In North America, services are projected to account for the largest share of the benefits, representing close to 30% of the total impact by 2030. This reflects the size of the services sector in the regional economy and its capacity to use mobile-enabled technologies to improve customer experience, automate processes and create new digital business models.

Public administration and manufacturing will also make significant contributions. In public administration, 5G and related technologies can support more efficient digital government services, emergency response, public safety and infrastructure management. In manufacturing, advanced connectivity can enable automation, real-time monitoring, predictive maintenance and more resilient supply chains.

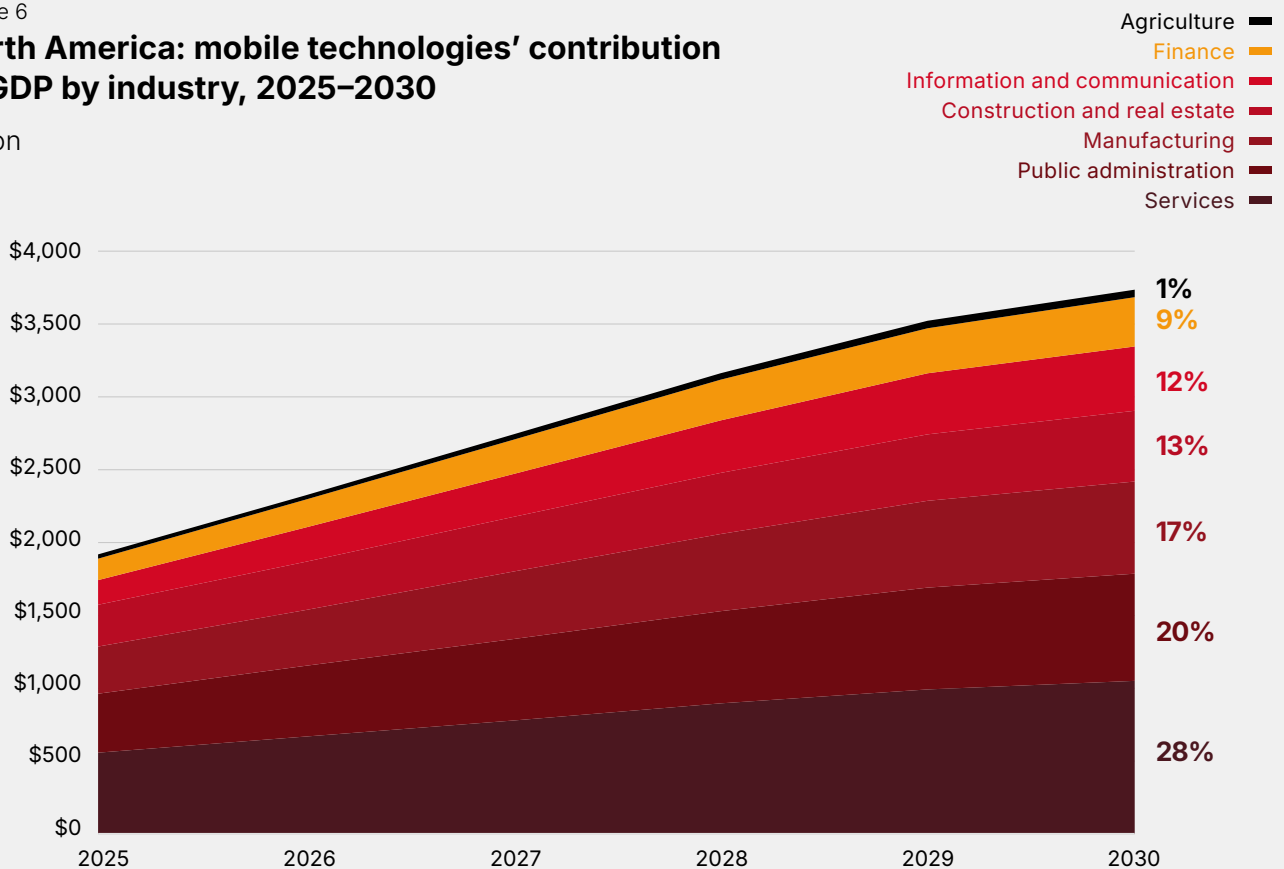
The information and communication sector’s contribution is projected to increase strongly, rising from 9% in 2025 to 12% by 2030, reflecting the central role of digital industries in North America’s growth model.

Overall, the distribution of impact highlights how mobile technologies can support productivity gains across the economy, helping North America translate digital leadership into stronger and more sustained long-term growth.

Figure 6

## North America: mobile technologies’ contribution to GDP by industry, 2025–2030

Billion



Source: GSMA Intelligence

# 02

## Trends shaping the mobile industry



## 2.1

# Operators look to transform 5G scale into returns

North America has largely completed the first phase of its 5G investment cycle and has become an important testbed for monetisation. By the end of 2025, 5G covered 98% of the US population and 90% of Canada's, following significant investment in non-standalone (NSA) networks and low- and mid-band spectrum. As coverage has matured, operators have shifted investment from footprint expansion to 5G SA networks, FWA densification and network automation. The commercial priority is to move to generate returns from the infrastructure already deployed.

The transition to 5G SA and 5G-Advanced expands the range of services operators can support. In removing dependence on the legacy 4G core, 5G SA enables capabilities such as network slicing, lower latency and more flexible allocation of network resources. T-Mobile US launched the world's first nationwide commercial 5G SA network in 2020, while AT&T and Verizon subsequently progressed through phased deployments. All national operators in the US had launched 5G SA by the end of 2025, though the extent of availability and customer migration varies.

Network capability does not constitute a revenue model in itself. Evidence from early 5G monetisation efforts in the region shows that the most viable propositions address an identifiable customer need, reuse existing network assets and minimise dependence on new devices or complex operating systems.

The distinction between network capability and commercial viability matters, as 5G's contribution to operator revenue growth has so far been mixed. While some operators have generated incremental revenues through services (e.g. bundles and FWA), global mobile revenue grew by an average of around 2% per year between 2022 and 2025,<sup>2</sup> indicating that faster connectivity alone has limited pricing power. Experience with early 5G monetisation instead points to the need for a portfolio approach. Volume-based tariffs, bundles and FWA can generate returns at scale, while slicing, APIs, private wireless and AI-enabled services require more selective development around defined customer outcomes.

## FWA provides the clearest proof of monetisation

FWA is North America's most commercially proven 5G revenue model. It allows operators to compete in the established fixed broadband market by reusing mobile spectrum and network capacity rather than constructing a parallel fixed access network. GSMA Intelligence identifies FWA as the only at-scale disruptor among the 5G revenue models assessed and the model with the strongest demonstrated return on investment.<sup>3</sup> The US illustrates how the model has been deployed at scale:

- Verizon had 5.7 million FWA connections by the end of 2025 and reached 6.2 million by June 2026. T-Mobile US had 8.5 million 5G broadband customers, having added 1.9 million customers in 2025. Together, the two operators served more than 14 million customers, highlighting the growing competitive significance of FWA in the

US broadband market. T-Mobile US has a target of 15 million 5G broadband customers by 2030, alongside between 3 and 4 million fibre customers.<sup>4</sup>

- AT&T is pursuing a more converged model, offering contract mobile service alongside either fibre or 5G fixed wireless home internet through bundled propositions. The strategic value lies not just in adding broadband connections but also increasing the value and longevity of the customer relationship. AT&T claims converged customers have lower churn, subscribe to faster internet services, attach more wireless lines and remain with the operator for longer.<sup>5</sup> It expects discounts on converged services to be offset over time by lower churn and additional service purchases. This differentiates AT&T's approach from a predominantly capacity-led FWA model.

2. [Monetising 5G: what works, what doesn't and the implications](#), GSMA Intelligence, 2026

3. [Monetising 5G: what works, what doesn't and the implications](#), GSMA Intelligence, 2026

4. "T-Mobile Raises the Bar, Increasing its Multi-Year Growth Outlook, Fueled by Widening and Durable Differentiation Across America's Best Network, Best Value, and Best Customer Experiences With Unparalleled Growth Opportunities", T-Mobile, February 2026

5. "AT&T Reports Strong Third-Quarter Financial Performance", AT&T, October 2025

Canada presents a different but complementary opportunity. FWA is particularly relevant where distance, population density or construction costs make fibre deployment uneconomical. In February 2026, Xplore announced plans to invest more than CAD120 million expanding its 5G Ultra fixed-wireless service across Alberta, supported by CAD60 million

in federal and provincial funding. The deployment will use more than 400 towers to make available services with download speeds of up to 500 Mbps to over 245,000 households, including more than 70,000 underserved households covered by the funded programme.<sup>6</sup>

## Operators commercialise differentiated connectivity

While FWA can monetise spare network capacity, 5G SA expands the connectivity features operators can offer commercially. A cloud-native core can support differentiated levels of priority, reliability, security, latency and uplink performance, creating opportunities to move beyond best-effort connectivity to services designed around specific operational requirements.

These capabilities are an enabling layer rather than products in their own right. Enhanced experience propositions require 5G SA architecture, compatible devices, end-to-end orchestration, real-time analytics and a clear explanation of why differentiated performance merits a premium.

Early examples from the region are those where customers buy an operational outcome (such as assured video uplink, dedicated capacity, enhanced security, faster restoration or a service-level commitment) rather than a technical feature. GSMA Intelligence research highlights how enhanced experience models are promising but remain niche, with high levels of operational complexity.<sup>7</sup> The public-safety area has provided one of the clearest early routes to commercialisation in the US, with enterprise IoT also emerging as an option:

- AT&T launched a nationwide 5G SA core dedicated to FirstNet (the US public-safety network for first responders) in July 2026. A physically separate core is designed to provide greater reliability, security and operational control, as well as faster uploads and improved responsiveness. It also establishes a foundation for differentiated treatment of applications including body-worn cameras, live video and mission-critical communications.
- Verizon expanded device support for its Frontline Network Slice in April 2026, bringing 5G SA connectivity to compatible laptops, tablets and smartphones used by first responders. The Frontline Network Slice provides public-safety

entities and first responders with dedicated 5G network resources that can be allocated in real time as operational demands change.

- AT&T and Cisco have activated a 5G SA-native IoT platform. This combines the operator's nationwide 5G SA core with Cisco's Mobility Services Platform. The solution enables programmable network capabilities, including network slicing and application-aware performance to support enterprise use cases such as connected vehicles.

Automotive connectivity offers another potentially repeatable model. For example, Verizon Business and KDDI are providing 5G SA and LTE connectivity for newly manufactured BMW Group vehicles in the US, supporting infotainment, remote services and telematics. The commercial attraction lies in embedding connectivity into a multi-year service relationship and defined operating environment, rather than relying on an isolated connectivity sale.

Canada is progressing along the same path of differentiated connectivity, though commercial development remains at an earlier stage. Bell's 5G+ Advanced launch and Rogers' deployment of Ericsson RedCap software provide the foundations for differentiated enterprise and IoT services. Bell's network is powered by its SA core and initially covers the Greater Toronto and Hamilton Area, with expansion underway in the Niagara region. However, theoretical peak speeds and network availability are measures of technical readiness rather than monetisation. The ultimate test will be whether these capabilities support propositions with demonstrable adoption, and recurring usage and revenue.

The importance of identifiable commercial outcomes is reflected in the deployment priorities among operators in North America (see Figure 7). They identified clear use cases and monetisation opportunities as the leading factor to help accelerate 5G SA deployment.

6. "Xplore Awarded Federal and Provincial Funding to Expand Ultra-Fast Fixed Wireless Internet Across Rural Alberta", Xplore, February 2026

7. [Monetising 5G: What works, what doesn't and the implications](#), GSMA Intelligence, 2026

Figure 7

## Factors accelerating 5G SA deployment in North America

Which factors would accelerate the deployment of 5G SA across your network? (Select top 2 factors)

Percentage of operators. Multiple responses allowed.



Source: GSMA Intelligence Network Transformation Survey 2025

## New capabilities broaden the opportunity, but returns will take time

The shift from network performance to customer outcomes creates a foundation for more scalable capability-based models. Network APIs, RedCap and satellite connectivity broaden the services, devices and locations operators can address, but each remains at an earlier stage of monetisation than FWA, for example.

### Network API efforts shift from expanding availability to driving usage

Network APIs offer a scalable way to expose operator capabilities. GSMA Open Gateway enables functions such as identity verification, device status, location and quality on demand to be made available through standardised interfaces that developers can integrate into applications.

Six operators across the US and Canada had recorded GSMA Open Gateway deployments as of June 2026. The potential commercial advantage is repeatability. A standardised capability can be consumed by multiple developers and enterprises without requiring a bespoke network deployment for each customer. However, simply exposing an API does not create a meaningful revenue stream. Commercial adoption requires aggregation, consistent implementation across operators, developer uptake and an application where the network capability materially improves the outcome.

### RedCap expands the addressable IoT market

RedCap makes 5G more economical for products that do not require the full performance of conventional 5G devices. In June 2025, Rogers began deploying Ericsson's 5G-Advanced RedCap software across its national network. The technology is intended to support devices such as sensors, cameras and monitoring equipment, as well as low-power consumer wearables. The economic value of RedCap is more likely to come from expanding the number of connected endpoints and enabling higher-value managed services around them, than from connectivity revenue from each device.

### Satellite adds coverage and retention value

Satellite connectivity provides a further route to differentiation, particularly in remote areas and markets on the edge of coverage. Early operator pricing follows a mixed model. Some services are sold as paid add-ons, while others are incorporated into high-value tariffs to support retention and plan differentiation. The revenue opportunity remains at an early stage.

## 2026 Fifa World Cup turns network performance into a commercial test

The 2026 Fifa World Cup provided more than a showcase for network coverage. It tested whether North American operators could use 5G capacity, automation, private networks and differentiated connectivity effectively across stadia, airports, transport hubs, fan zones and across host cities.

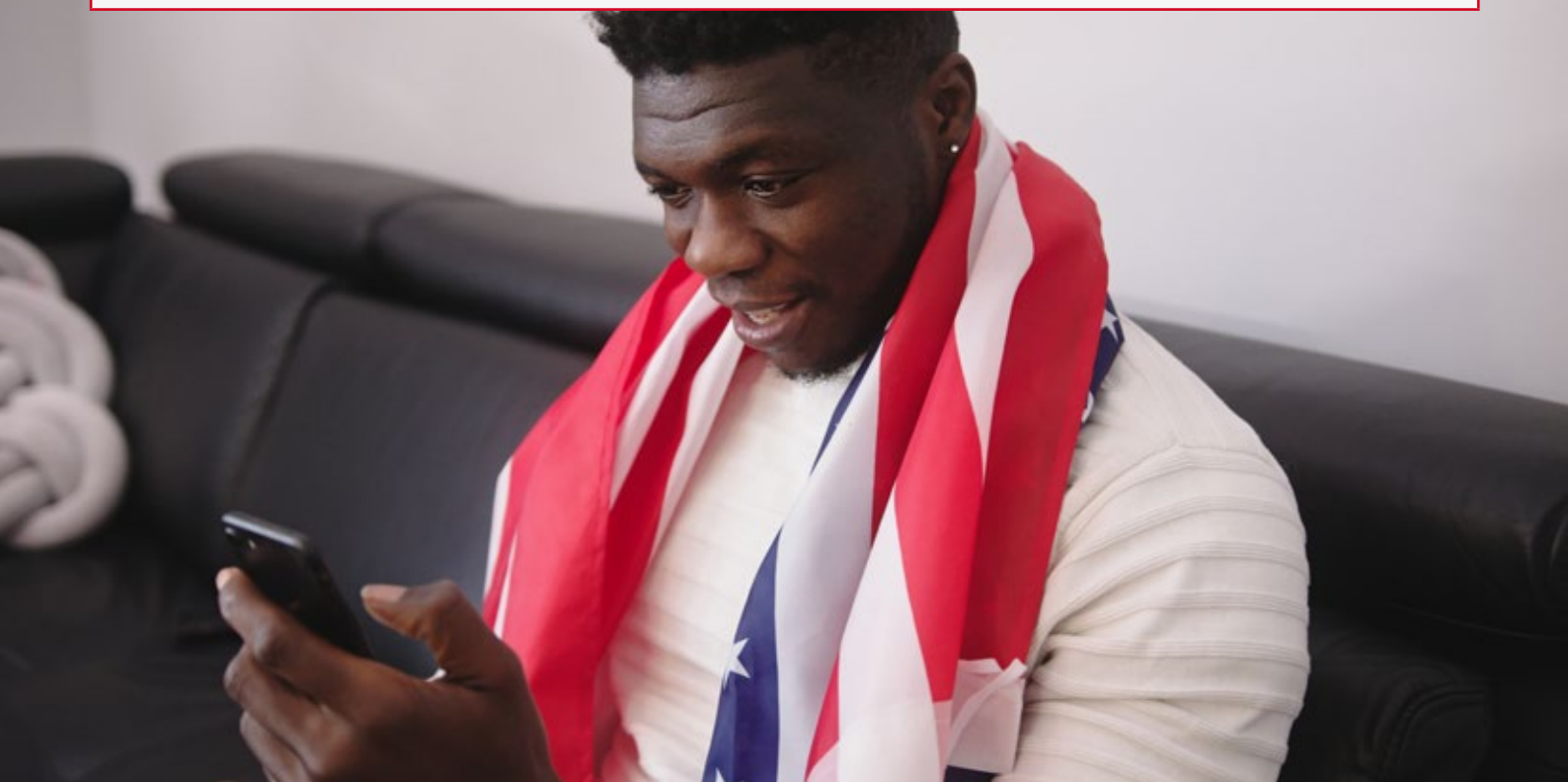
T-Mobile US increased capacity at 57 locations, including 11 stadia, 17 airports, 13 transit hubs and 16 fan festivals. It combined temporary infrastructure with AI-driven optimisation and 5G-Advanced capabilities.

Verizon increased capacity by an estimated three to five times across US host stadia, installed thousands of under-seat antennas and deployed nearly 140 small cells and temporary sites. Its infrastructure also included private 5G, FWA, fibre and broadcast solutions. The network carried nearly 500 TB of data across US stadia during the tournament, while a private 5G network supported body cameras used for the referee-view broadcast service.

In Canada, Rogers reported that it invested CAD27 million expanding its 5G+ network in Toronto and Vancouver ahead of the World Cup, upgrading connectivity across stadia, fan zones, hotels and major transport hubs. The enhancements included additional 5G+ spectrum, an upgraded in-stadium wireless system equivalent to adding 16 cell towers, and temporary Cell on Wheels and Cell on Light Trucks to support high-traffic areas.

The investments supported record levels of mobile data traffic, as fans used connectivity for live streaming, social media and in-stadium digital experiences. For instance, Rogers carried 510 TB of data across venues, fan zones and watch parties,<sup>8</sup> while Bell reported 250–330 TB across 13 matches.<sup>9</sup> Bell also used AI-powered network monitoring and trialed 5G network slicing for broadcast operations and public-safety communications, demonstrating the expanding range of advanced 5G use cases.

Looking ahead, the more important test is whether permanent upgrades, operational experience and new capabilities can support enterprise relationships and repeatable services after the tournament.



8. "Rogers Delivers World-Class Network Experience for Soccer Fans on Canada's Best 5G+ Network", Rogers, July 2026

9. "Bell delivers a championship network performance during Canada's summer of world-class soccer", Bell, July 2026



## Shaping the 6G era

Although the immediate commercial priority remains extracting greater value from 5G, North America has started shaping the standards, spectrum and security environment for 6G. The central question is not simply whether the region can lead the next technology cycle, but whether 6G can build on existing 5G assets, simplify migration and address identifiable customer demand.

International cooperation is already underway. In July 2026, more than 20 countries, including the US and Canada, joined the 2026 Call to Action for 6G Leadership and Security, committing to greater cooperation on the security, interoperability and resilience of future networks. Meanwhile, the US National Telecommunications and Information

Administration (NTIA) is moving ahead with studies of 4.4 GHz as it assesses multiple mid-band frequencies for potential commercial use, as dictated by the One Big Beautiful Bill passed in 2025.<sup>10</sup> Globally, governments are already shaping the spectrum, security and policy frameworks that will underpin the 6G era, even with commercial deployment several years away.<sup>11</sup>

Despite the growing confidence in 6G's potential, the business case is still evolving. Less than half of operators surveyed globally believe the mobile industry's interest in 6G is driven by clear business demands. This suggests operators need to play a more active role in the development of 6G to ensure it delivers a return on investment.<sup>12</sup>

10. "Global governments commit to tight 6G timeline", Mobile World Live, July 2026

11. "NTIA approves US 4.4GHz 6G research", Mobile World Live, August 2026

12. Global Mobile Trends 2026, GSMA Intelligence, 2026



## 2.2

# Satellite connectivity moves into mainstream mobile services

North America is emerging as the leading market for direct-to-device (D2D) satellite connectivity, supported by commercial investment and an increasingly enabling regulatory environment. Partnerships dominated industry activity in 2024, followed by the first commercial services in 2025. In 2026, the market entered a more strategic phase as operators, satellite providers and technology companies invested in spectrum, constellations and commercial platforms capable of connecting standard mobile devices beyond terrestrial coverage. In the US, the FCC updated rules to facilitate supplementary coverage from space using terrestrial mobile spectrum. Canadian authorities launched consultations on the future framework for satellite-to-mobile services.

The industry is increasingly moving towards a hybrid connectivity model, with terrestrial networks the primary source of mobile coverage and capacity,

while satellites provide a complementary layer in areas where terrestrial service is affected by network outages, unavailable or difficult to deploy. This includes remote areas and transport corridors, but also gaps in otherwise well-covered urban and suburban markets.

The strategic debate is shifting from whether operators should participate in satellite connectivity to how much control they retain over spectrum, service delivery and customer relationships. Satellite connectivity is becoming a strategic domain shaped by competition, collaboration and digital sovereignty considerations. Reflecting this, operators now maintain an average of 1.5 satellite partnerships each, highlighting growing interest in multi-provider strategies rather than a reliance on a single constellation.<sup>13</sup>

13. [Satellite and NTN Tracker, Q2 2026](#), GSMA Intelligence, 2026

## Competing D2D models emerge

North America has become an important proving ground for two principal D2D models. The first model uses spectrum licensed to terrestrial mobile operators to connect standard smartphones directly to satellites. This allows operators to extend coverage using existing spectrum and compatible devices, but it requires close coordination with satellite providers.

T-Satellite provides an example of this model in commercial operation. The service combines T-Mobile US's spectrum with Starlink's Direct-to-Cell constellation. By January 2026, more than 150,000 customers were using the service each day, on average. During Winter Storm Fern, it supported more than 250,000 users and carried over 1.5 million messages, demonstrating its role in terms of coverage extension and a resilience layer during terrestrial disruption.

AST SpaceMobile is pursuing a broader direct-to-smartphone broadband proposition using spectrum provided by operator partners. In the US, the company is working with AT&T and Verizon, while its Canadian partners include Bell and Telus.

AST SpaceMobile reported 13 spacecraft in orbit and preparations for selected beta activity in 2026, but scaled commercial availability remains dependent on further constellation deployment, regulatory approval and network integration.<sup>14</sup>

The second D2D model uses dedicated mobile-satellite service spectrum and devices with integrated satellite capabilities. Apple and Globalstar established this approach with emergency communications, roadside assistance, messaging and location-sharing services on compatible iPhones. The model gives the device company greater control over integration and customer experience but depends on compatible devices and satellite-specific spectrum.

The emergence of Elveo Mobile adds a further variant. Satellite players Lynk Global and Omnispace have finalised a merger announced in 2025, with the combined SES-backed entity Elveo Mobile promoting itself as able to move faster and further than other D2D companies. Elveo plans to use globally coordinated S-band spectrum. However, it does not yet provide commercial D2D services to end users.

## Partnerships reshape the D2D ecosystem

The early D2D market was built mainly around bilateral partnerships between individual mobile and satellite operators. The next phase is likely to involve multi-provider platforms, shared infrastructure and greater operator participation in the D2D ecosystem, as evidenced from recent joint-venture activity.

In May 2026, AT&T, T-Mobile US and Verizon reached an agreement in principle to form a joint venture to expand satellite connectivity. The proposed venture plans to expand satellite-based D2D connectivity and reduce wireless dead zones across the US, particularly in underserved and remote areas. The collaboration will combine terrestrial spectrum

resources and enhanced satellite capacity to improve mobile coverage, emergency connectivity and customer experience. Additionally, the initiative aims to establish common technical specifications for integration between satellite and terrestrial wireless networks.

Competition is also extending beyond mobile operators' existing partners. SpaceX is using Starlink to build a commercial D2C service, while Amazon's proposed acquisition of Globalstar would give the company access to mobile-satellite spectrum and complement its existing satellite, cloud and ground infrastructure assets.

14. "AST SpaceMobile Eyes D2D Rollout", Converge Digest, August 2026



## Moving beyond emergency messaging

Early D2D propositions have focused on emergency communications, location sharing and basic messaging when outside terrestrial coverage. The next stage focuses on integrating satellite connectivity into mainstream mobile plans, selected applications and enterprise services.

For consumers, satellite connectivity offers greater geographic reach and resilience when terrestrial coverage is unavailable. For operators, it can support customer retention and tariff differentiation, either as a paid-for add-on or as part of a higher-value plan. It is estimated that, when separately priced, satellite services could represent an uplift of 10–30% on contract ARPU. However, the overall revenue effect remains uncertain because many offerings are still at an early commercial stage.<sup>15</sup>

Rogers in Canada, for example, is integrating satellite connectivity into mainstream mobile services. The operator includes satellite-to-mobile connectivity in selected plans and has extended supported coverage to customers travelling in the US through its partnership with T-Mobile US. The service supports selected messaging, mapping, weather and communications applications.

Enterprise services could generate more predictable and regular demand than consumer messaging, particularly where connectivity supports continuous tracking or operational processes. Rogers' satellite-enabled Geotab solution allows businesses to track vehicles and equipment outside terrestrial coverage. Amazon's proposed network similarly targets remote worksites, fleet and supply chains. In these cases, the value lies in asset visibility, operational continuity and safety.

15. [Monetising 5G: What works, what doesn't and the implications](#), GSMA Intelligence, 2026

# The mobile and satellite ecosystems begin to converge

The expansion of mobile-satellite partnerships is changing how satellite capacity is integrated into terrestrial networks. Around 70% of North American operators expect engagement with satellite companies to increase over the next two years.

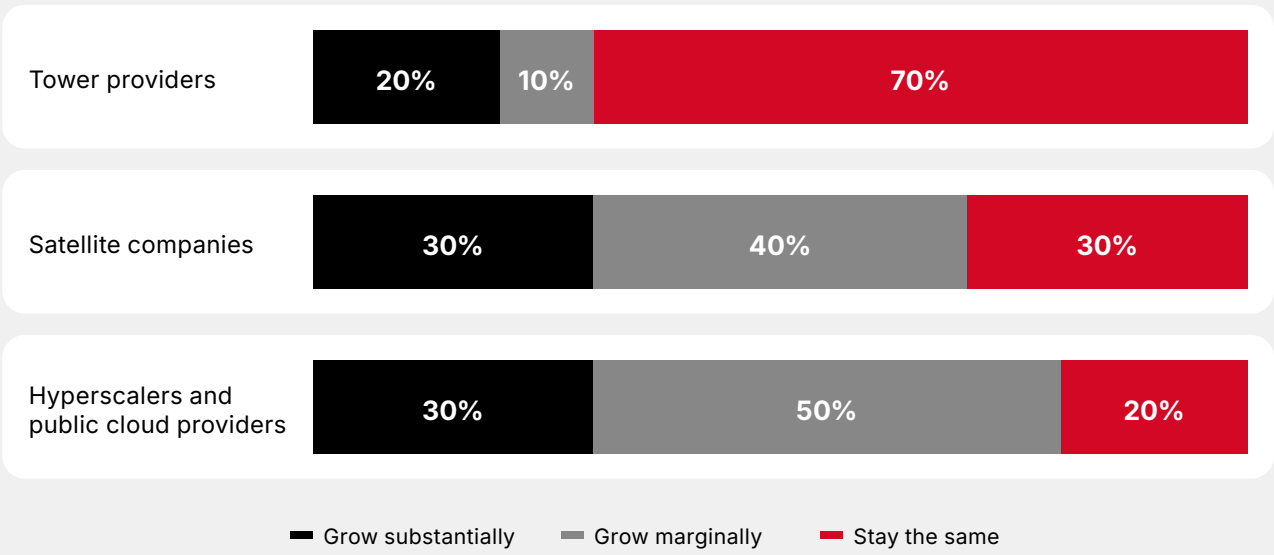
This comprises 30% who expect a substantial increase and 40% who expect a marginal increase. Satellite providers rank second only to hyperscalers and public cloud providers among the ecosystem partners operators expect greater collaboration with.

Figure 8

## Satellite providers are becoming increasingly important ecosystem partners

To what extent do you expect your engagement with the following ecosystem players in support of your network operation to change over the next two years?

Percentage of surveyed operators in North America



Source: GSMA Intelligence Network Transformation Survey 2025

# Integration will determine the commercial value

Greater constellation capacity and a growing number of partnerships will not themselves create a sustainable service model. Commercial value will depend on how easily customers can access satellite connectivity and whether it addresses a sufficiently important consumer, enterprise or public sector need.

The customer experience will be equally important. Satellite access needs to work consistently across compatible devices, tariffs and national borders, with provisioning, billing and customer support integrated into existing mobile services. The long-term objective

is for satellite connectivity to operate as a seamless network extension.

GSMA Intelligence estimates an incremental global revenue opportunity from D2D of \$30–35 billion by 2035. This implies a 2–3% uplift on the telco top line worldwide.<sup>16</sup> Achieving this opportunity will require further progress beyond emergency messaging to more regular consumer, enterprise and public sector use.

16. [Global Mobile Trends 2026](#), GSMA Intelligence, 2026



## 2.3

# Operators move up the AI value chain

North American operators are seeking to capture value across the AI stack – from connecting data centres and supporting distributed compute to embedding AI in networks and developing enterprise services. The region's advanced cloud, semiconductor, data-centre and 5G ecosystems create significant opportunities, though operator strategies vary by market.

In the US, operators are using fibre, wireless, edge and data-centre assets to connect into an established AI ecosystem where hyperscalers and technology companies are in leading positions. Their focus is on providing the connectivity and distributed infrastructure needed to move AI workloads between enterprises, cloud platforms and compute locations.

In Canada, operators are taking a more direct role in the compute layer by investing in domestic data centres, GPU infrastructure and sovereign AI platforms. In both markets, the objective is to move beyond transporting data and become part of the infrastructure used to process, distribute and secure AI workloads.

Sovereign AI activity is particularly advanced in North America. Around 40% of operators in the US and Canada have commercially launched or piloted sovereign AI offerings, compared to 20–36% in other regions.<sup>17</sup>

17. [Telco AI: State of the Market, Q2 2026](#), GSMA Intelligence, 2026

## Networks become part of the AI infrastructure stack

AI infrastructure requires more than compute. Training and inference workloads depend on high-capacity, resilient connectivity between data centres, cloud platforms, enterprises and edge locations. This offers operators an opportunity to extend their fibre, wireless, data-centre and edge assets to the wider AI infrastructure stack.

Operators in the US are largely pursuing this opportunity through partnerships with cloud and technology companies:

- **Verizon** has positioned its AI Connect strategy around a combination of network, compute, data-centre and co-location infrastructure. In November 2025, it announced a deal with AWS to build new high-capacity fibre routes connecting AWS data centres, providing resilient, low-latency connectivity for AI workloads.
- **AT&T** announced a collaboration with AWS in March 2026 to provide 5G and fibre connectivity directly into AWS environments, aimed at business-grade AI workloads including real-time analytics, machine learning and agentic AI.

- **T-Mobile US** and Nvidia announced work in March 2026 to bring physical AI applications to T-Mobile's distributed edge AI network, using Nvidia accelerated computing to support AI applications closer to where data is generated.

In Canada, developments indicate a compute-led approach:

- **Bell** is developing Bell AI Fabric as a national AI infrastructure platform. In March 2026, it announced a 300 MW AI data centre in Saskatchewan, with a significant portion of the facility's capacity intended for sovereign AI compute. The facility will be connected to Bell's national fibre backbone. Bell has also announced partnerships with compute and infrastructure companies including Cerebras and CoreWeave.
- **Telus** is expanding domestic AI compute capacity. In May 2026, it announced work with the government of Canada on a proposed sovereign AI infrastructure cluster in British Columbia which is intended to scale to more than 60,000 GPUs and 150 MW by 2032.

## AI moves deeper into the network

Operators are applying AI within networks to improve capacity, resilience, energy management and fault resolution. Among North American operators, 80% identify network optimisation as a leading operational AI use case, followed by troubleshooting (70%) and network management (20%). This indicates a shift from using AI to analyse historical performance to systems that can influence network behaviour and resource allocation.

Several developments illustrate this transition:

- In May 2026, **T-Mobile US** and Ericsson moved AI-native scheduling and link adaptation software into commercial trials. This predicts changing radio conditions and adjusts how network capacity is allocated and data is transmitted in real time. The trials on T-Mobile's live 5G-Advanced network increased spectral efficiency by close to 10% and downlink throughput by up to 15% compared with legacy rule-based methods.

T-Mobile US has also introduced AI-driven network optimisation for high-density events. Its Dynamic CX capability, announced in June 2026, uses AI to identify potential large gatherings and adapt network performance as demand changes, building on its existing self-organising network capabilities.

- **Bell** is applying AI to network operations. Its Google Cloud-based solution correlates network data with customer experience, prioritises anomalies according to traffic impact and supports faster resolution of incidents.
- **Telus** is working with Samsung and Capgemini on network automation. The partnerships apply AI to network operations and management while modernising the systems used to coordinate automation.

Rather than using AI just to identify faults or analyse past performance, operators are beginning to apply it to optimise resources and respond to changing conditions in near real time. The economic value lies in obtaining more from existing assets. Improvements in capacity, energy management and fault resolution can reduce operating costs and defer some hardware investment. However, adoption remains at different stages across operators and network functions.

## AI shifts from efficiency to revenue

AI deployments among operators initially focused on internal efficiency, particularly customer care, back-office automation and predictive maintenance. Cost reduction remains important, but revenue objectives are becoming more prominent.

In the first quarter of 2026, 47% of new operator AI deployments tracked in North America had a revenue objective, including AI inference and GPU-as-a-service.<sup>18</sup> In the US, 50% of the new deployments tracked in the second half of 2025 were primarily revenue oriented.<sup>19</sup> This shows a shift from internal productivity to external AI services.

The opportunity is not simply to carry more AI traffic. Direct AI traffic currently represents around 0.2% of total telecoms traffic,<sup>20</sup> limiting the near-term value available from generic consumer usage. The stronger opportunity lies in enterprise applications that combine connectivity, edge infrastructure, operational data and sector expertise.

In March 2026, AT&T – with MicroAI, Nvidia and Microsoft – launched Connected AI for Manufacturing, combining 5G, IoT and generative AI to support industrial analytics, predictive maintenance and computer vision at the edge. The proposition links AI capabilities to a specific enterprise requirement, rather than treating AI as a standalone service.

In Canada, commercial models are developing around sovereign compute and attached services. Telus provides startups and scale-ups with domestic AI capacity and commercial support through its Sovereign AI Accelerator with L-Spark. Bell is combining compute, fibre and technology partnerships through AI Fabric. Both models seek to generate value beyond GPU usage by attaching connectivity, security, advisory services and ecosystem support. Telus' fully subscribed Rimouski facility provides early evidence of demand for sovereign AI compute in Canada.<sup>21</sup>

Bell's Suspicious Call Detection provides a consumer-facing example of AI being embedded in an existing connectivity service. In July 2026, Bell introduced an AI model that identifies and flags suspected spoofed calls in real time across Bell and several of its mobile brands. The capability is applied automatically on compatible devices. Rather than generating a separate subscription, it strengthens trust and the perceived value of the core mobile service.

To generate revenue from AI, operators are combining assets they already control, including fibre, spectrum, edge locations, operational data and enterprise relationships, with specialist technology supplied from partners. The opportunity will depend on turning these combinations into repeatable commercial services rather than bespoke technology demonstrations.

18. [Telco AI: State of the Market, Q1 2026](#), GSMA Intelligence, 2026

19. [Telco AI: State of the Market, Q4 2025](#), GSMA Intelligence, 2025

20. [Global Mobile Trends 2026](#), GSMA Intelligence, 2026

21. "Telus and Government of Canada advance work to scale Canada's sovereign AI infrastructure", Telus, May 2026



## Trust and cybersecurity are increasingly part of the AI proposition

Growing use of cloud infrastructure, software-defined networks, third-party platforms and AI expands the potential surface for cyberattacks. AI can accelerate network monitoring and threat detection, but it can also increase the speed and sophistication of attacks.

Verizon's 2026 Data Breach Investigations Report found that exploitation of software vulnerabilities had become the most common initial access vector, accounting for 31% of breaches. Third-party involvement accounted for 48% of breaches, while the report also highlighted the growing use of generative AI in malware and social engineering.<sup>22</sup>

Operators are responding through greater collaboration. In May 2026, eight US communications providers (AT&T, Charter, Comcast, Cox Communications, Lumen Technologies, T-Mobile US, Verizon and Zayo) established the Communications Cybersecurity Information Sharing and Analysis

Center (C2 ISAC). The organisation is intended to facilitate real-time intelligence sharing, technical collaboration and coordinated defence across communications infrastructure.

The initiative reflects the practical limitation that no single operator has visibility across the entire threat environment. As networks depend more heavily on cloud providers, software partners and AI systems, resilience increasingly requires trusted information exchange across organisational boundaries.

Cybersecurity is also becoming part of operators' commercial differentiation. Operators such as Bell and Telus offer sovereign AI platforms that combine domestic compute and connectivity with assurances around data residency, security and operational control. Sovereign AI platforms need to demonstrate not just that data and compute remain within the country but also that models, infrastructure and customer information are governed securely.

22. 2026 Data Breach Investigations Report, Verizon Business, 2026

# 03

## Mobile industry impact



Mobile operators in North America are extending the social and economic benefits of connectivity through initiatives that improve affordable access, provide devices and digital skills, and strengthen resilient communications. This reflects a broader shift in

digital inclusion. Connectivity remains the foundation, but meaningful participation in the digital economy depends on affordability, confidence, relevant services and support to use digital tools safely and effectively.

## 3.1

# Expanding participation in the digital economy

Operators in North America are increasingly embedding digital inclusion initiatives in community settings, recognising that internet access, devices and digital skills often need to be delivered together, particularly for groups facing affordability, confidence or capability barriers. Examples include the following:

- **AT&T expands community-based digital access in the US.** In March 2026, AT&T announced plans to add more than 20 Connected Learning Centres during the year, with each receiving investment of up to \$50,000 from AT&T, three years of AT&T Fiber, computers and access to digital skills training and educational resources. By July 2026, the operator had opened its 100th Connected Learning Centre in Sacramento, California. The centres, which are housed in non-profit organisations, provide free internet, Wi-Fi, computers and digital literacy resources, and had served more than 200,000 people nationwide by July 2026. In California, the operator plans to open six additional

Connected Learning Centres in 2026, including sites designed to support communities where low-income households continue to face gaps in high-speed internet access or device ownership.<sup>23</sup>

- **Telus combines affordable access with targeted social support in Canada.** Through its Connecting for Good programmes, Telus combines low-cost connectivity, devices, assistive technology, digital literacy resources and healthcare access for segments such as low-income households, older age groups, young people leaving care, refugees and those with disabilities. Telus reports that its Internet and Mobility for Good programmes have positively impacted more than 298,000 people, while its Health for Good mobile clinics have delivered more than 354,000 patient visits. The company also reports that Tech for Good has supported more than 18,000 people living with disabilities and that Telus Wise workshops have reached more than 921,000 Canadians.<sup>24</sup>

## Connecting communities and strengthening resilience

The social value of connectivity is particularly visible where geography, remoteness or natural disasters make access to essential services more difficult. Terrestrial, satellite and deployable communications infrastructure can support public safety, emergency response and economic resilience where conventional networks are unavailable or under pressure.

- **Supporting disaster response and public safety.** FirstNet, built with AT&T, provides a dedicated nationwide wireless communications platform for US first responders. Its deployable assets are designed to support communications during disasters and in remote or hardest-hit areas. AT&T has also expanded deployable network assets including LEO satellite-enabled equipment, to strengthen emergency-response readiness.

- **Providing support during natural disasters.** Following Hurricane Lala in Hawaii in August 2026, T-Mobile US deployed portable generators to sites affected by widespread power outages, and used its self-optimising network to make more than 160 automated adjustments as network conditions changed. Customers exchanged nearly 29,000 messages through T-Satellite after the operator extended access ahead of the storm, while compatible devices also received Wireless Emergency Alerts via satellite. T-Mobile US provided unlimited talk, text and data across Hawaii for several weeks, deployed community teams to provide connectivity and device charging, and offered eligible public-safety agencies 30 days of T-Priority and T-Satellite access at no additional cost.<sup>25</sup>

23. "Opening Doors to Opportunity: Six New Connected Learning Centers Coming to California", AT&T Connects, June 2026

24. See [www.telus.com/en/social-impact/connecting-canada](https://www.telus.com/en/social-impact/connecting-canada)

25. See <https://www.t-mobile.com/news/category/community>



## 3.2

# Supporting community development and local opportunities

Operators are investing in community facilities, education, employment and local projects. Such initiatives extend their social impact beyond connectivity by strengthening the institutions and opportunities that enable people to participate in the digital economy.

For example, in June 2026, T-Mobile US announced the final recipients of its five-year, Hometown Grants initiative. The operator invested more than \$22.8 million in 500 projects across small towns and rural communities in 49 states and Puerto Rico.

The operator reports that the programme reached 4.2 million people, helped create more than 2,770 jobs, generated more than 300,000 volunteer hours and almost \$125 million in matching funds. Projects included digital learning hubs, accessible public spaces and community facilities.<sup>26</sup>

26. "T-Mobile Completes Landmark Hometown Grants Initiative, Transforming 500 Communities", T-Mobile, June 2026

## 3.3

# Advancing environmental sustainability

The environmental impact of mobile connectivity extends across network energy use, devices, equipment, transport and supply chains. North American operators are responding through

renewable energy procurement, network efficiency measures, device reuse and recycling, and community-based conservation programmes.

### Extending device lifecycles

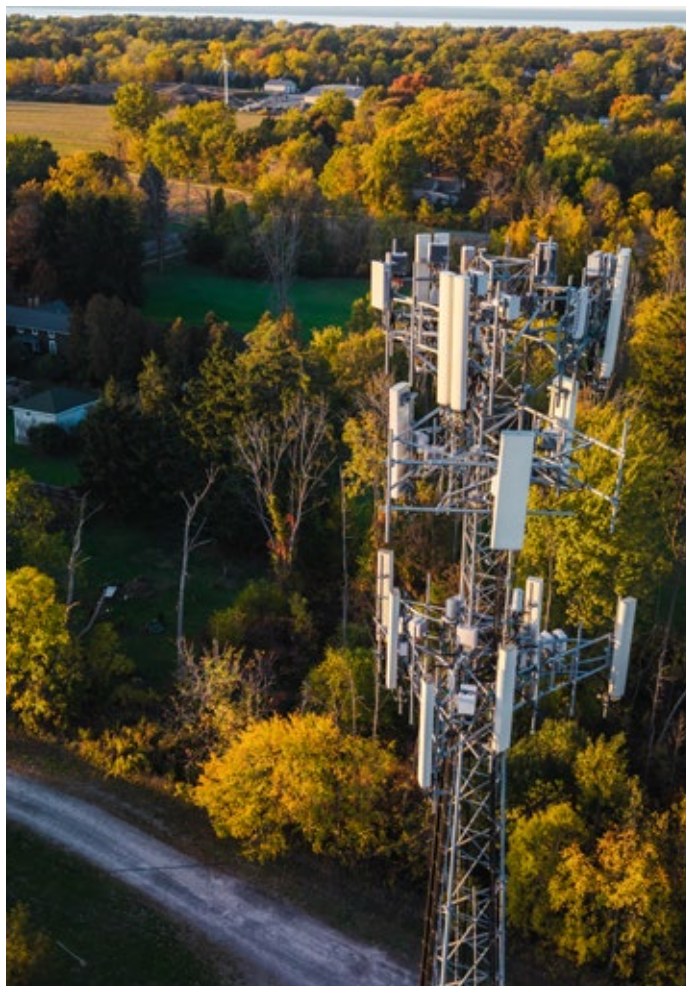
Telus Trade-In and Device Care encourage customers to return, refurbish and reuse devices, helping to keep valuable materials in circulation and reducing the environmental impact associated with new device production. Rogers has also introduced device reuse

and recycling initiatives to support the refurbishment and redistribution of mobile devices. Meanwhile, Bell began its Blue Box recycling programme in 2003, allowing Canadians to return mobile phones for reuse or recycling.

### Reducing operational emissions

Renewable electricity and energy efficiency remain the main routes for reducing operators' direct operational emissions. In February 2026, Telus announced that it had sourced electricity equivalent to 100% of its global operational requirements from renewable or low-emitting sources as of 31 December 2025.<sup>27</sup> The operator also launched a Climate Transition Framework establishing its pathway to net-zero, greenhouse-gas emissions across its value chain by 2040. Its validated targets include reducing operational emissions by 46% by 2030 and 85% by 2033, against a 2019 baseline. Telus also aims for 65% of suppliers by expenditure to have science-based targets by 2028.

In an August 2026 emissions disclosure, Verizon reported a 73% reduction in market-based Scope 1 and 2 emissions by the end of 2025, against its 2019 baseline. This exceeded its science-based target of a 53% reduction by 2030. Verizon also reported sourcing renewable energy equivalent to 74% of its annual electricity use in 2025, against a target of 100% by 2030.<sup>28</sup>

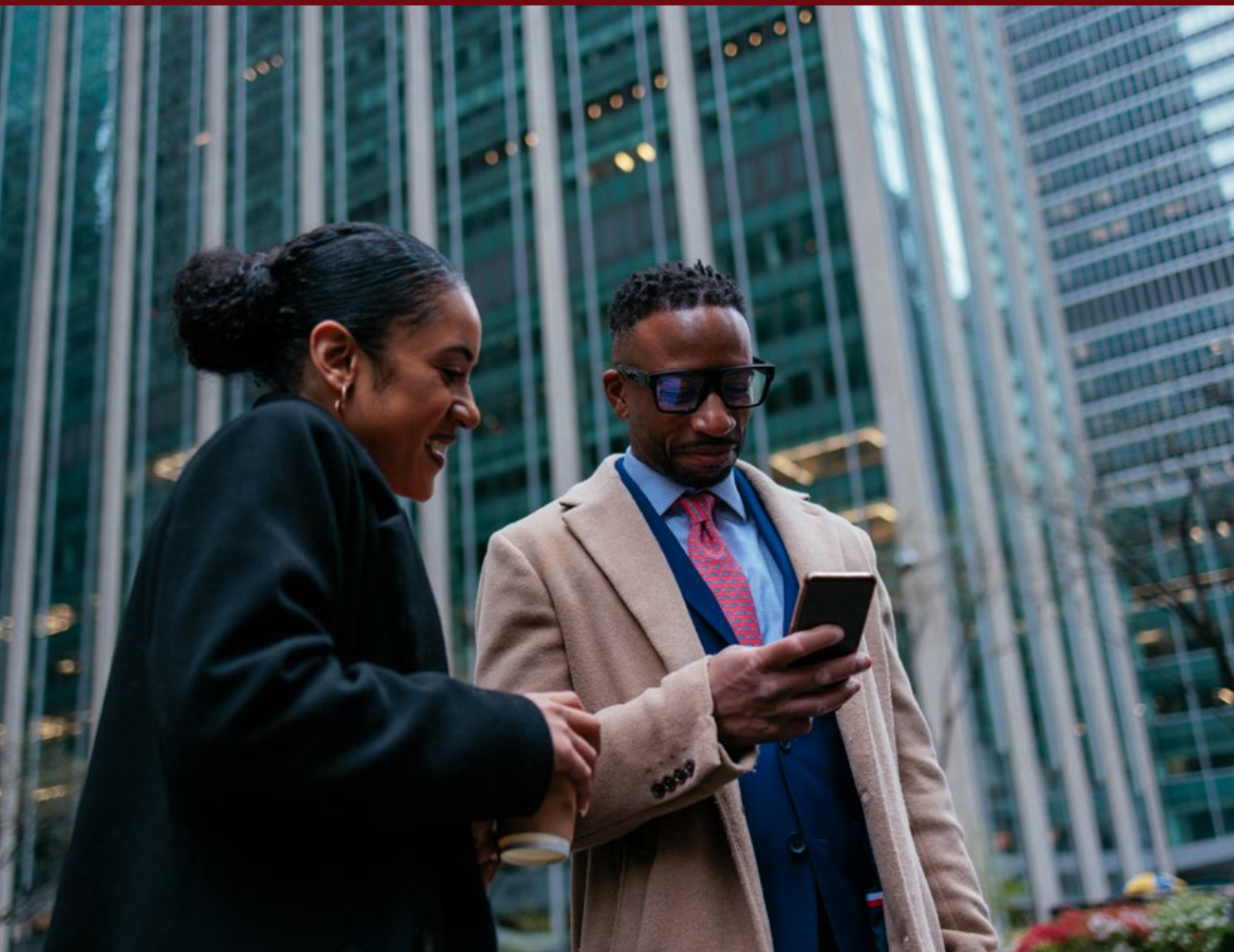


27. "Telus achieves its 100% renewable and low-emitting electricity target", Telus, February 2026

28. See <https://www.verizon.com/about/investors/verizon-emissions-and-energy-data>

# 04

## Policies for innovation and growth



## 4.1

# Shaping the policy agenda for space-sector reform and anti-fraud initiatives

The US space economy was a key focus for the FCC in 2026, including a complete overhaul of the Space Bureau's licensing process for space and earth stations, creating a "licensing assembly line" with modular applications, faster review timelines, new licence categories and 20-year licence terms. In August 2026, the FCC opened a proceeding to use 200 MHz of unlicensed spectrum for D2D satellite links.

Meanwhile, both the US and Canada continue to work on tackling scams and fraud. The FCC strengthened know-your-upstream-provider (KYUP) requirements and the Robocall Mitigation Database. The government of Canada launched a public consultation in March 2026 on its National Anti-Fraud Strategy. Led by Finance Canada, this whole-of-government effort seeks to tackle fraud across its full lifecycle, from stopping initial contact with scammers through to supporting victims after the fact.

## 4.2

# Preparing for growth through effective spectrum policy

North America has been a global leader in 5G, supported by early access to spectrum bands including 600 MHz, 2.5 GHz and 3.5 GHz. These have provided the combination of wide-area coverage and capacity needed to support strong network performance and rapid adoption. As a result, 5G became the region's leading mobile technology in 2024 and is forecast to account for around 90% of mobile connections by 2030.

In the US, the One Big Beautiful Bill Act restored the FCC's spectrum auction authority and established a pipeline of 800 MHz for commercial mobile services. This represents an important step towards addressing future spectrum demand and supporting continued investment in advanced mobile networks. However, timely implementation and access to sufficiently wide, contiguous mid-band channels will remain important as the industry prepares for 6G.

Looking ahead, growing demand for advanced applications, including AI-enabled services and extended reality, will require a new spectrum roadmap for the 2030s. Mid-band spectrum will be particularly important, with wider 200–400 MHz channels expected to support future capacity needs and drive the region's 6G leadership. North America has already begun preparing for this transition, including new US efforts aimed at making additional spectrum available for commercial use. Continued leadership in mobile connectivity will depend on timely spectrum planning across low, mid- and high bands to support future investment, innovation and network growth.

**Growing demand for advanced applications, including AI-enabled services and extended reality, will require a new spectrum roadmap for the 2030s**

## Future growth

Meeting North America's future connectivity needs will require significant additional mid-band spectrum. The region will require an average of 2.1–2.9 GHz of total mid-band spectrum by 2040 to accommodate rising mobile data demand and to support the introduction of 6G services.

The World Radiocommunication Conference in 2027 (WRC-27) will consider important bands to achieve the required spectrum capacity, including 4.5 and 7–8 GHz. However, as each of these bands has incumbent use, regulators and policymakers need to plan for increased mobile spectrum requirements now, considering the lead times required for international harmonisation, equipment development and network deployment.

At the national level, timely access to additional mobile spectrum will be necessary to maintain network performance and support future capacity requirements. Since 6G will build incrementally on existing bands, the 3.8–4.2 GHz band is particularly important, as it will continue to support 5G+ while providing a foundation for future 6G services. The upper 6 GHz band is also a major part of the long-term spectrum pipeline for mobile services globally. More than 80% of the world's population lives in countries that have already identified the band for mobile use. Access to harmonised mid-band spectrum, alongside future candidate bands under discussion at WRC-27, will help strengthen the mobile ecosystem, support investment and ensure networks can continue to evolve to meet future demand.

## Rural expansion

Extending connectivity to rural and underserved communities across North America remains a priority for governments. Ensuring access to low-band spectrum can help. Existing assignments in bands including 600, 700 and 850 MHz have provided an important foundation for expanding mobile coverage across wide geographic areas. However, additional low-band spectrum will continue to play an important role in extending coverage, improving indoor

performance and promoting digital inclusion. The 470–614 MHz band could be used for mobile in the future.

As mobile networks evolve towards 6G, complementary low-band spectrum will remain essential to support wide-area coverage and ensure the benefits of advanced connectivity are available beyond urban centres.



## Ubiquitous connectivity

D2D satellite connectivity is emerging as an important supplement to terrestrial mobile networks across North America. By enabling standard mobile devices to connect directly to satellites, D2D can help extend communications coverage beyond the reach of terrestrial infrastructure, supporting connectivity in remote, underserved and hard-to-reach locations.

While D2D has the potential to extend connectivity for some applications, satellite systems operate with weaker signals and lower spectrum efficiency than terrestrial mobile networks, limiting the amount of capacity they can provide. As a result, D2D is best

viewed as a supplementary solution for remote and sparsely populated areas rather than a substitute for terrestrial mobile broadband. In populated areas, terrestrial mobile networks using low-band spectrum will remain the most efficient means of delivering high-quality mobile broadband services.

The continued development of D2D will also feature at WRC-27. An important objective for policymakers will be creating regulatory frameworks that support innovation while ensuring protection of existing terrestrial mobile networks from harmful interference. Safe power limits and clear rules are required.

## Further reading

- Digital transformation of vertical sectors: the new wave of B2B opportunities revealed by the 2025 global enterprise survey, GSMA Intelligence, 2025
- Telco AI: State of the Market, Q2 2026, GSMA Intelligence, 2026
- The Mobile Economy Canada 2026, GSMA Intelligence, 2026

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