



Operator strategies for monetising public 5G enterprise services



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About this report

This report explores the difficulties operators face in monetising public 5G enterprise services, with a focus on commercial and organisational challenges.¹ It discusses the need to monetise existing 5G network capabilities as soon as possible, as well as the need to develop capabilities that will support operators' longer-term goals.

The current status of 5G deployment varies considerably by operator; only a few possess full 5G standalone (SA) networks. Some aim to use 5G to gain market share in the enterprise connectivity market while others anticipate offering complex 5G services to complement existing enterprise portfolios.

This report provides perspectives that will be useful for a range of operators at different stages of their 5G development.

It is based on several sources.

- Analysys Mason's previous research on public 5G enterprise services, in particular, our [case studies report](#) which profiles 11 propositions, with a focus on those closest to commercial launch.
- Discussions with operators and mobile network vendors.
- Analysys Mason's [5G deployment tracker](#), which includes details of 5G non-standalone (NSA) and SA network launches.



KEY QUESTIONS ANSWERED IN THIS REPORT

- What quick wins are available to operators to monetise enterprise 5G?
- What should operators be doing to stimulate demand from businesses and willingness to invest from potential partners?
- How can operators be confident to invest in more advanced 5G capabilities when future revenue streams are still uncertain?
- How should higher-value 5G connectivity services be introduced to the market?
- Which long-term commercial prospects for 5G enterprise services should operators be pursuing?



WHO SHOULD READ THIS REPORT

- Strategy, product and network planning teams within telecoms operators.
- Product and marketing teams within mobile equipment vendors.
- Potential partners for operator 5G enterprise services including application and technology developers, systems integrators (SIs) and partners for adjacent solutions including edge, AI and data analytics.
- Other parties interested in developments by the business divisions of telecoms operators, such as investors and regulators.



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Cultivating demand and commercial models





Maximising value from 5G connectivity

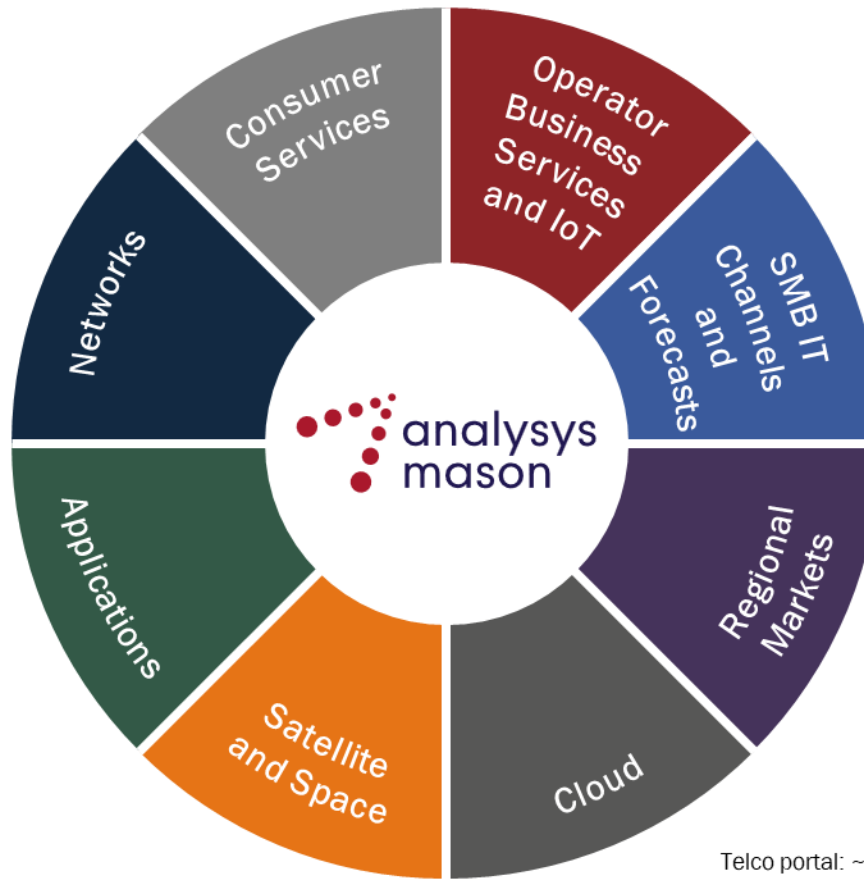
Selling services beyond connectivity

Appendix


About the author and Analysys Mason

Our research services

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Consumer Services
 Fixed Broadband Services
 Mobile Services
 Fixed-Mobile Convergence
 Smart Devices
 Future Comms
 Video, Gaming and Entertainment
- 
Networks
 Next-Generation Wireless Networks
 Wireless Infrastructure Strategies
 Fibre Infrastructure Strategies
 Operator Investment Strategies
 Telecoms Strategy and Forecast
 Transport Network Strategies
- 
Applications
 Network Automation and Orchestration
 Customer Engagement
 Monetisation Platforms
 Digital Experience
 Automated Assurance
 Service Design and Orchestration
 Telecoms Software Market Shares
- 
Satellite and Space
 Satellite Strategies for Telcos
 Satellite Capacity
 Satellite Infrastructure
 Satellite Mobility



- 
Operator Business Services and IoT
 Enterprise Services
 SME Services
 IoT Services
 Private Networks
 Cyber Security

- 
SMB IT Channels and Forecasts
 SMB Technology Forecaster

- 
Regional Markets
 Global Telecoms Data and Financial KPIs
 Americas
 Asia-Pacific
 Middle East and Africa
 European Core Forecasts
 European Telecoms Market Matrix
 European Country Reports

- 
Cloud
 Cloud Infrastructure Strategies
 Data, AI and Development Platforms
 Edge and Media Platforms
 Multi-Cloud Networking

- 
DataHub
 Forecast data for 80 countries

Telco portal: ~2800 forecast and ~320 historical metrics
 SMB Technology Forecaster portal: ~120 000 forecast metrics

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