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.

 [1] For a discussion of the technical challenges associated with 5G SA adoption see *5G standalone: vendor strategies to accelerate adoption*.

Contents

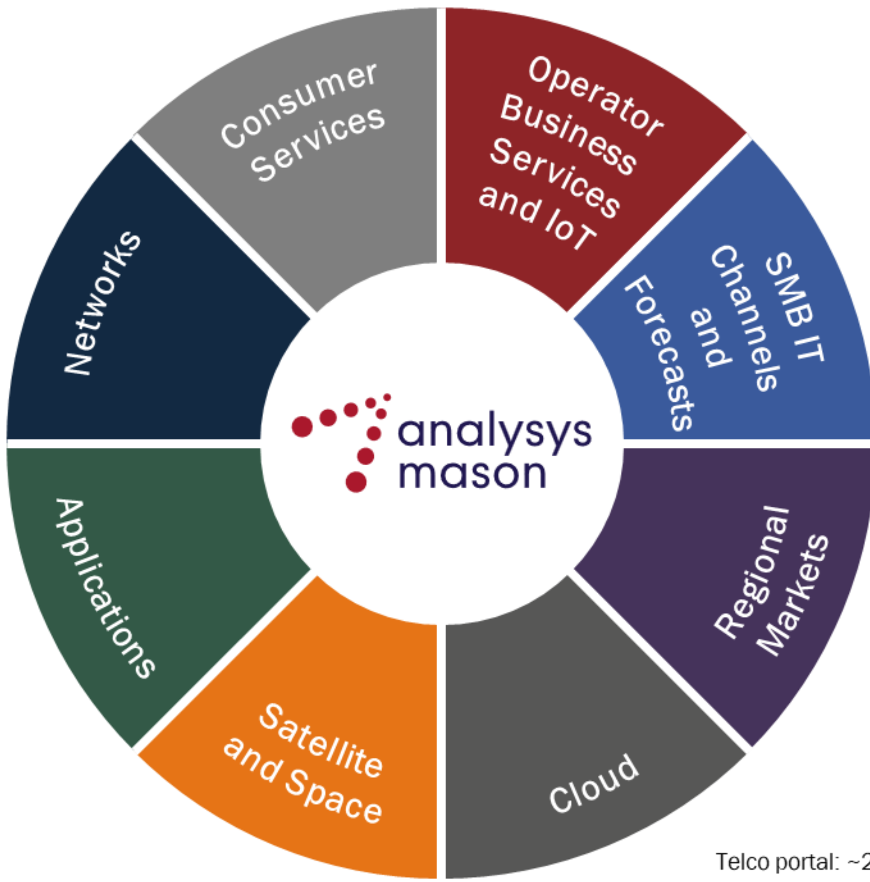
Our research services

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



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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

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