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The CIO Speaks
Taking the Pulse of Enterprise 5G

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Who are we, what do we do, and what do we know?

GSMA Intelligence is the definitive source of mobile industry insights, forecasts, and research, used around the world. Our insights cover every mobile operator, network, and MVNO in every country worldwide.

COMPREHENSIVE DATA PLATFORM	INSIGHTFUL RESEARCH	EXPERT ANALYSIS	BESPOKE CONSULTING	EVENT SUPPORT

Who we work with

Mobile Network Operators · Regulatory Bodies · Government Departments · Financial Corporations · Cybersecurity Firms · OEMs and Manufacturers · Technology Companies · Consulting Businesses

The 5G Era: A Trip Down Memory Lane
do you recall the original 5G use cases?

From the outset – long before any 5G networks went into operation – the core use cases and requirements were well-understood.

- eMBB
- mass-scale IoT
- critical communications

The vision was to create a multi-purpose network which could support increasingly demanding consumer requirements while opening up new enterprise opportunities.
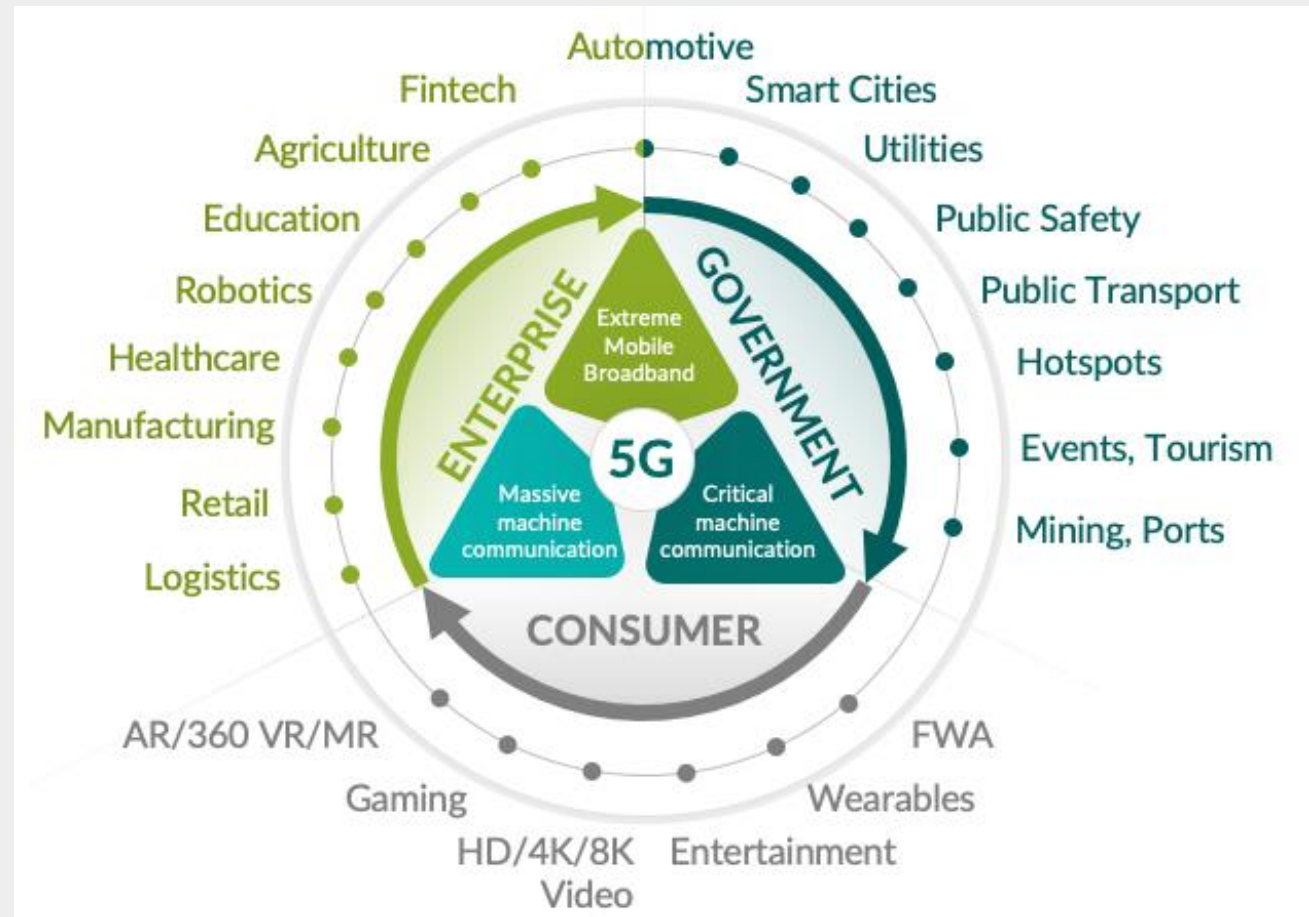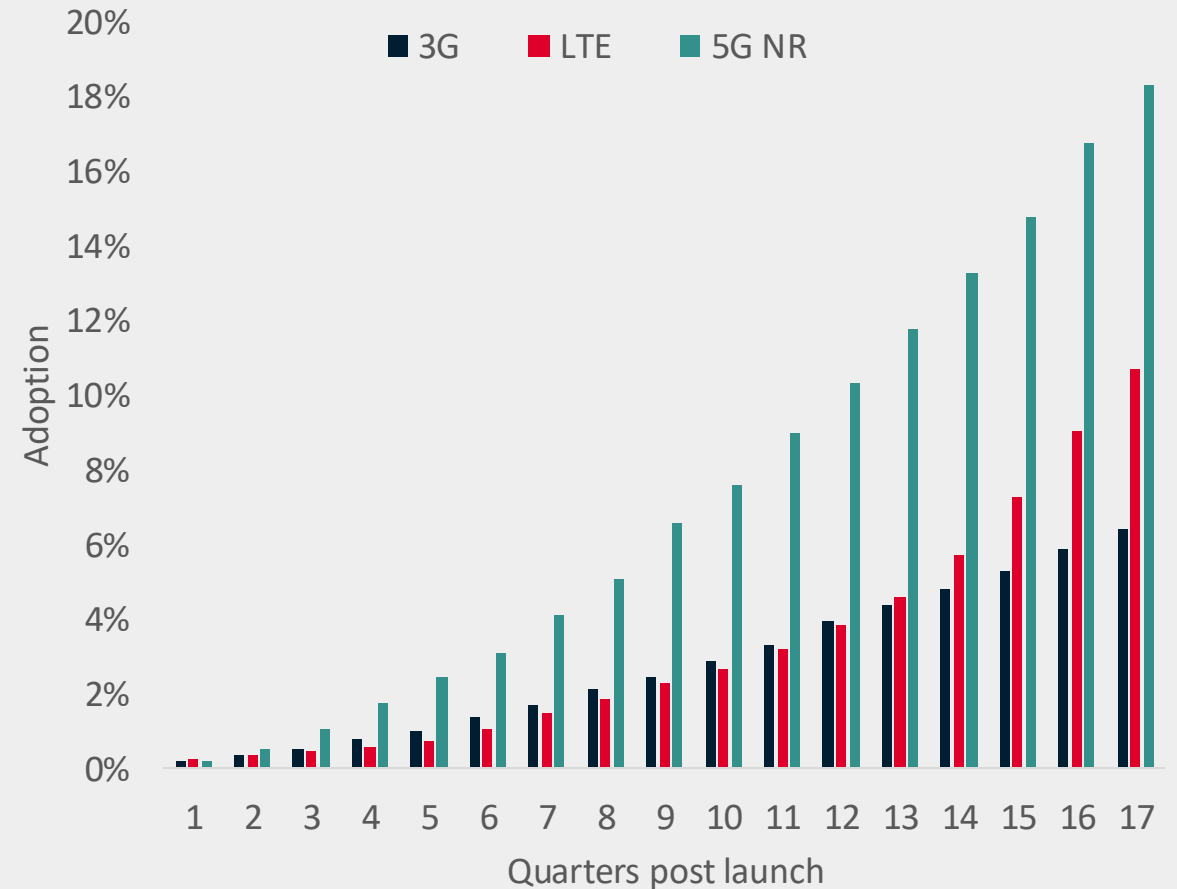
The 5G Era: Success Story?
incredible uptake is undeniable, by a large margin over other mobile broadband techs

At roughly 20% global penetration, 5G has been rolled out – and adopted – faster than 3G or 4G, thanks to various factors.

- spectrum availability
- (affordable) device availability
- understood value prop

This is, of course, a consumer success story. It doesn't necessarily reflect a business success or point to enterprise momentum.

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Chart legend: 3G, LTE, 5G NR. Y-axis: Adoption (0% to 20%). X-axis: Quarters post launch (1 to 17).

The 5G Era: Failure?
5G has helped operators meet traffic demands, but revenue generation is a different story

TELCO ARPU / DATA TRAFFIC

2023 vs. 2024 change
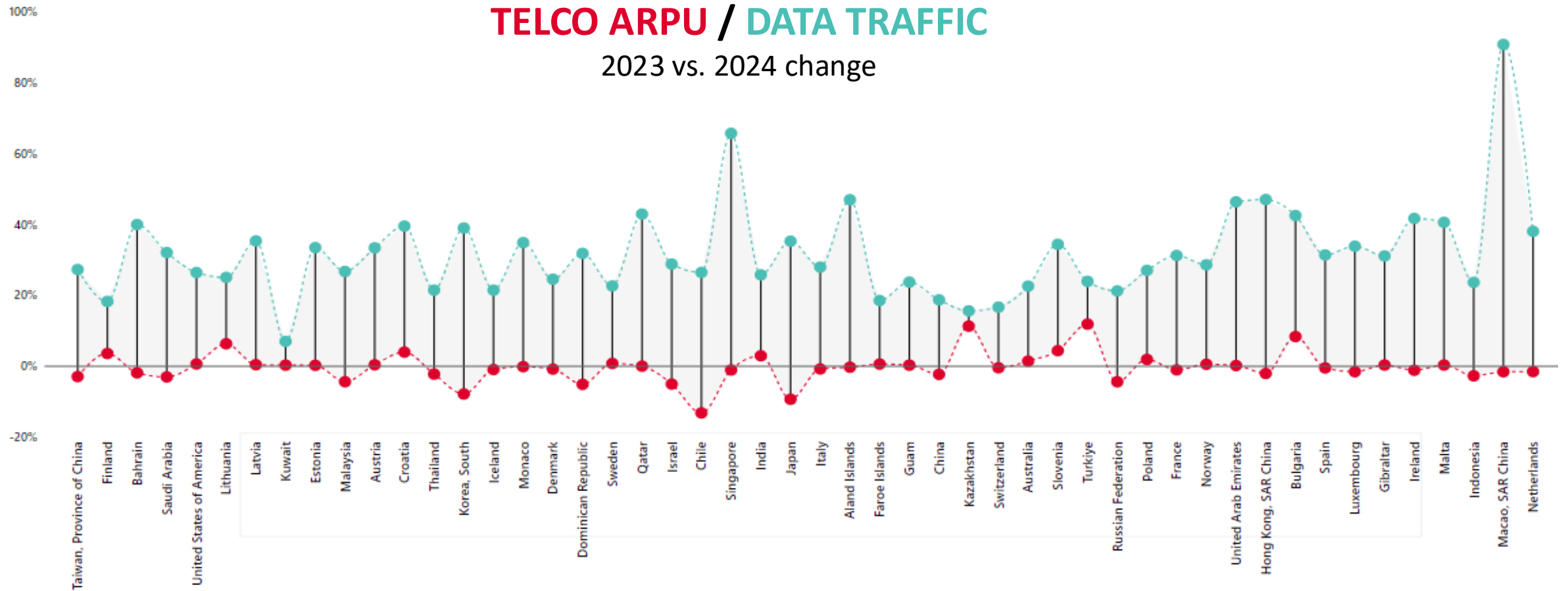
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The 5G Era: Big Question
whether on 5G, 4G or 3G (2G even) the question is the same

How do we penetrate the B2B opportunity...
...in order to monetize network investments?

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Understanding the CIO: what, when, who?
4,200 enterprise decision makers. 10 sectors. 21 countries. one massive set of insights

Vertical sectors

Manufacturing and Industrial Sectors

Transportation, Logistics & Warehousing

Automotive and Mobility

Utilities and Energy

Financial Services

Healthcare

Retail

Media and Entertainment

Agriculture, Forestry & Fishing

Public Sector

Countries

Asia
- Australia
- China
- India
- Indonesia
- Japan
- Kazakhstan
- South Korea

Europe
- France
- Germany
- Italy
- Spain
- UK

Middle East and Africa
- Egypt
- Morocco
- South Africa
- Saudi Arabia
- Türkiye

Americas
- Argentina
- Brazil
- Mexico
- US

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Understanding the CIO: what themes did we tackle?
by vertical, region, country, org size, state of digital transformation

Digital transformation	What's the state of digital transformation?	What are the primary objectives driving digital transformation?	Which vertical sectors are leading on digital transformation?	Which countries are leading on digital transformation?
Financial spending	How much will enterprises spend on digital transformation?	Which technologies will have the greatest financial spending?	Which vertical sectors will spend the most on digital transformation?	Which vertical sectors will spend the most on each technology?
Enabling technologies	What's the state of adoption?	What technologies are most important to the success of digital transformation?	What are the main benefits of using each technology?	What are the main deployment challenges for each technology?
Suppliers	Who are the preferred suppliers for each digital transformation technology?	Who are the preferred suppliers for digital transformation overall?	How do MNOs compare with other suppliers?	What do companies expect from MNOs?

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Understanding the Verticals: who cares most?
fintech, utilities and media/entertainment stand out (sort of)

Enterprise Verticals:

Use of Digital Technologies and Spending Prospects

Legend: ■ Use of Technology ■ Spending

Categories: Financial Services, Utilities / Energy, Media / Entertainment, Manufacturing, Healthcare, Transportation / Logistics, Automotive / Mobility, Retail, Public Sector, Agriculture, Forestry

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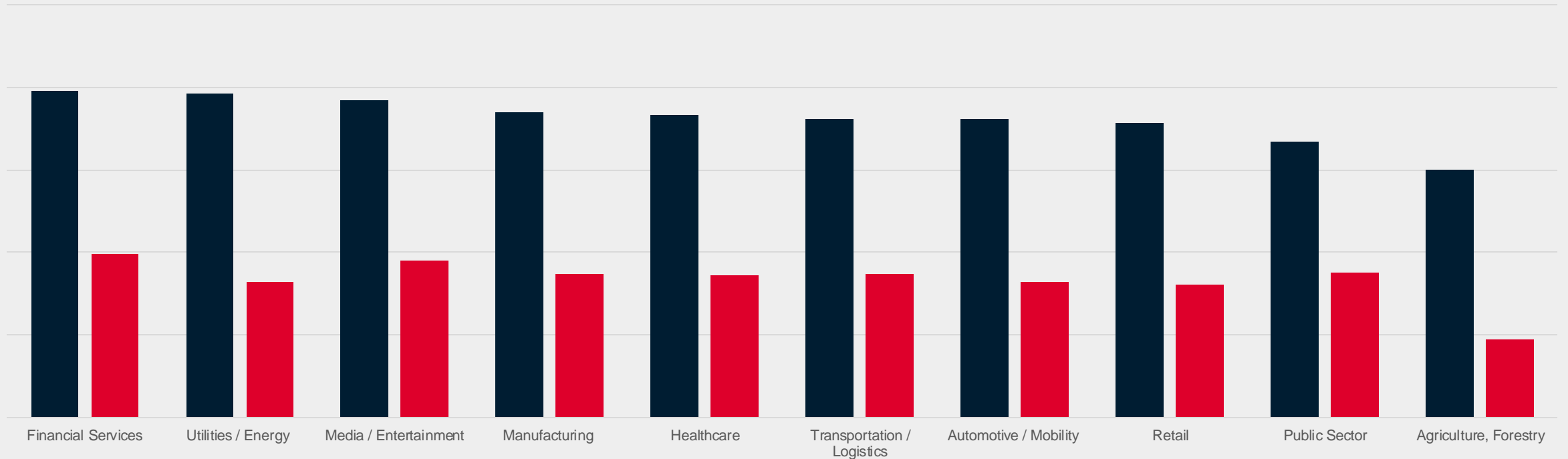
Understanding the Verticals: who cares most?
LAGGARDS, FOLLOWERS, LEADERS emerge when comparing tech use and spending

Enterprise Verticals:

Use of Digital Technologies vs. Spending Prospects
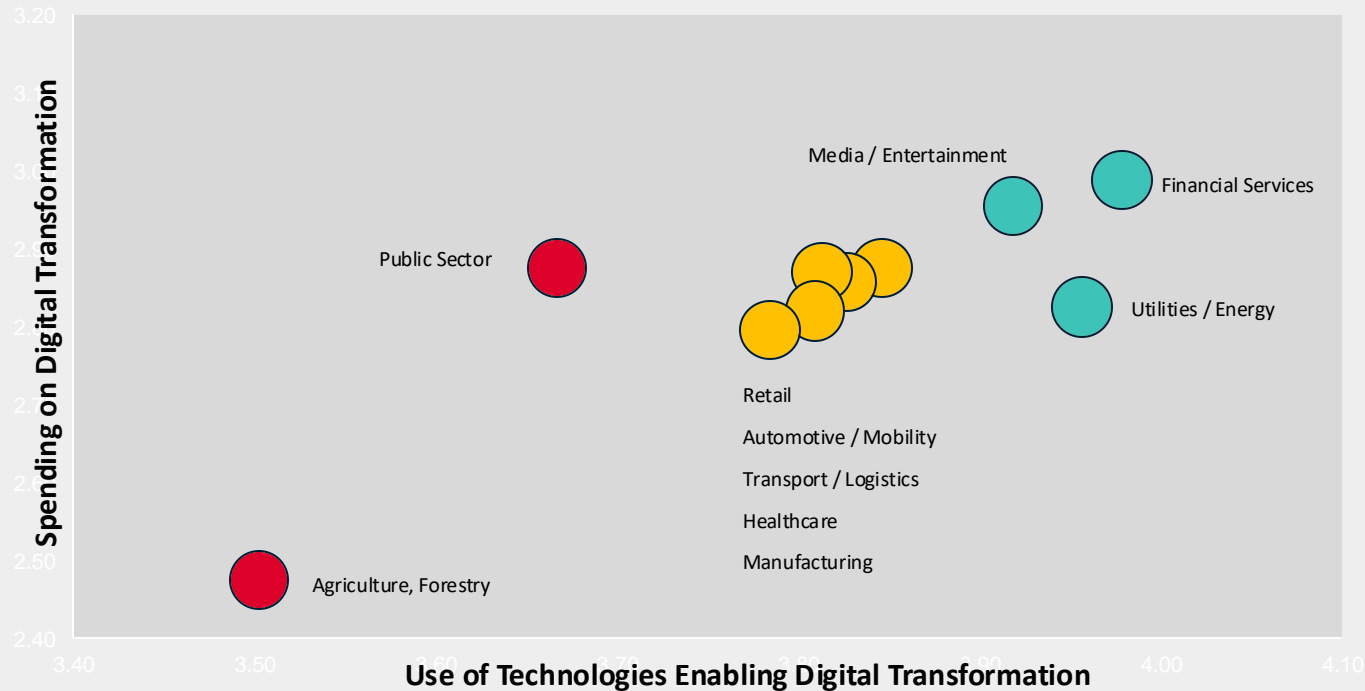
Understanding the Verticals: where does the US fit in?
across all verticals, US enterprises are more advanced – but with a future orientation

TECHNOLOGY
(use of tech enabling transformation)
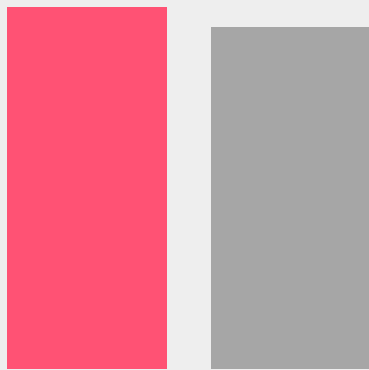
OBJECTIVES
(digital transformation plans and priorities)
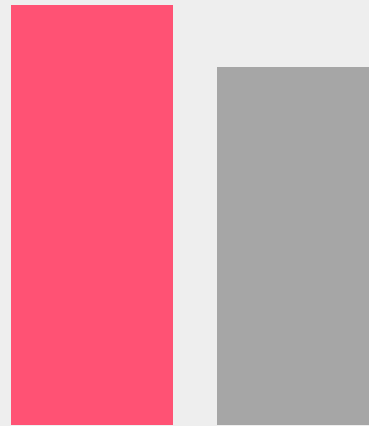
SPENDING
(current and future spending plans)
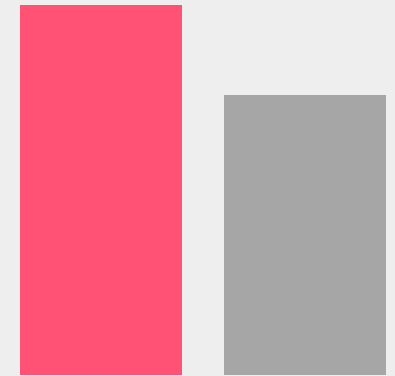
■ USA ■ Global

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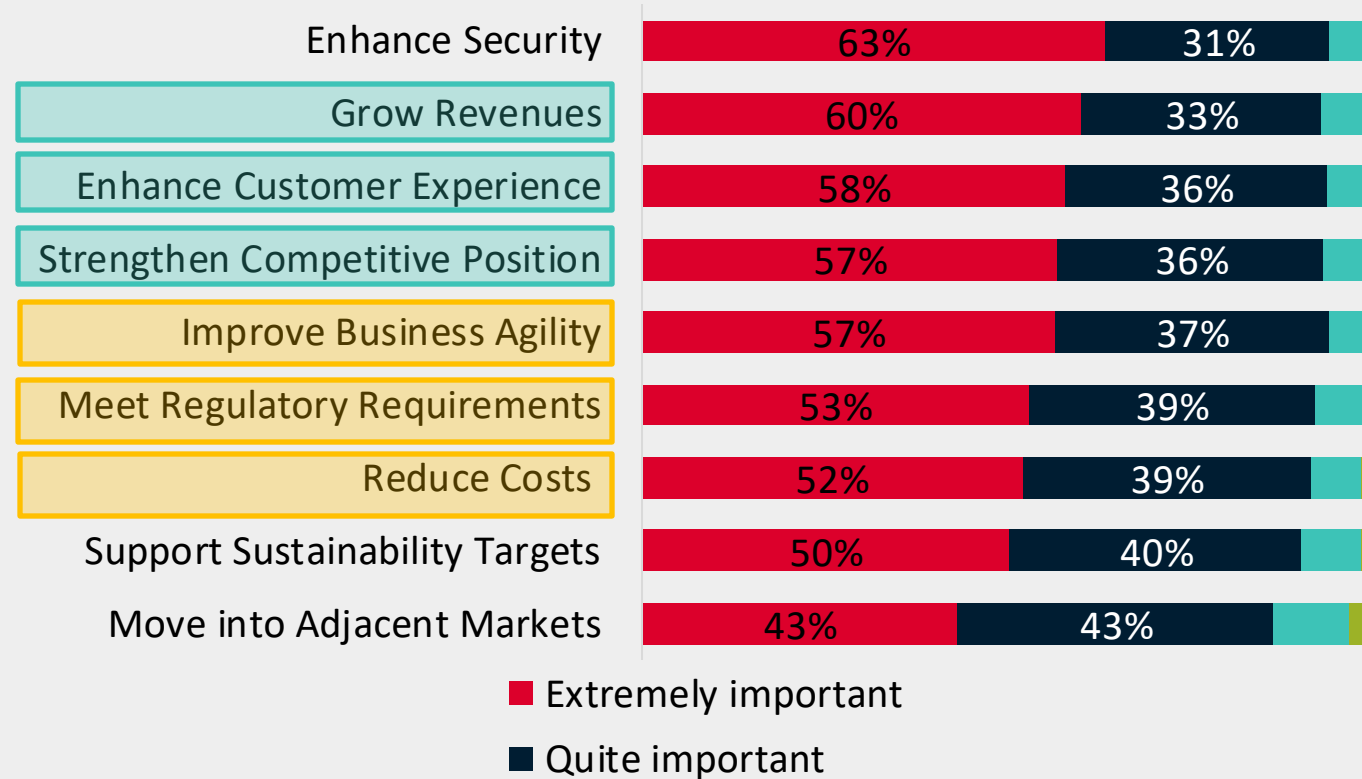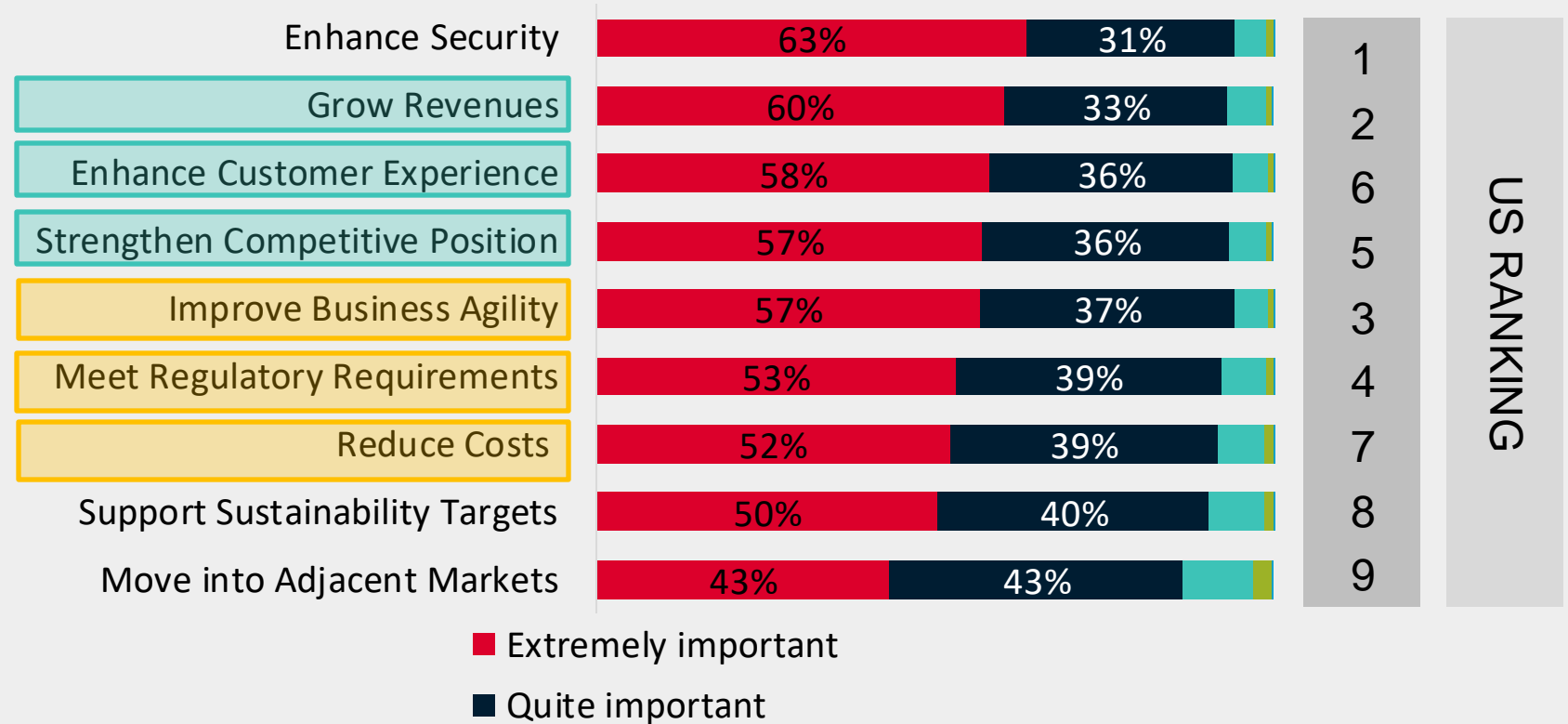
Transformation Spending: how will digital be funded?
there's a lot at stake with most industries planning to spend ~10% of revenues
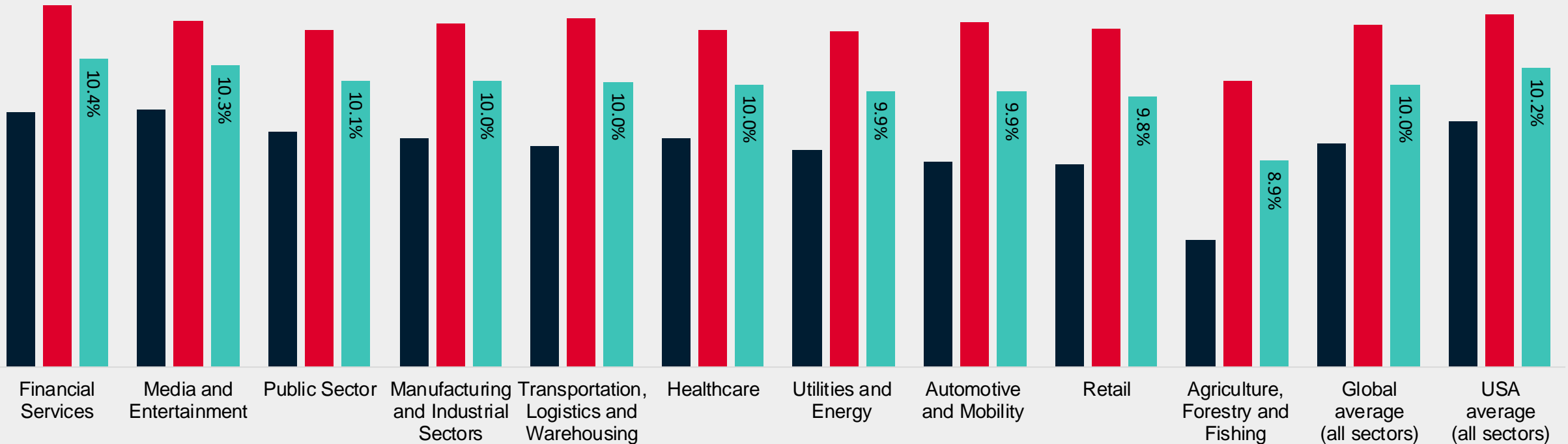
Financial Services — 10.4%
Media and Entertainment — 10.3%
Public Sector — 10.1%
Manufacturing and Industrial Sectors — 10.0%
Transportation, Logistics and Warehousing — 10.0%
Healthcare — 10.0%
Utilities and Energy — 9.9%
Automotive and Mobility — 9.9%
Retail — 9.8%
Agriculture, Forestry and Fishing — 8.9%
Global average (all sectors) — 10.0%
USA average (all sectors) — 10.2%

Legend:
During 2024-2026
During 2027-2030
Average (2024-2030)

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5G Transformation: what do enterprises want from 5G?
people want what 5G promised (better connectivity and security) to support cloud ops

5G Capabilities:

Importance to Digital Transformation Objectives

Capability	Extremely important	Quite important	Neither important nor unimportant
Enhanced security	57%	32%	8%
Enhanced connectivity	52%	37%	8%
Greater cloud-network integration	50%	37%	9%
Private Wireless Networks	46%	40%	11%
5G FWA (fixed-wireless access)	47%	39%	11%
5G IoT (URLLC, mMTC, RedCap, Sidelink)	43%	41%	12%
Greater integration with satellite networks	43%	39%	13%
Network API exposure	39%	43%	14%
Edge computing	38%	43%	14%
Network Slicing	34%	46%	15%
Open networks	36%	42%	17%

Legend:
- Extremely important
- Quite important
- Neither important nor unimportant
- Not very important
- Not at all important
- Wasn't aware of this potential benefit

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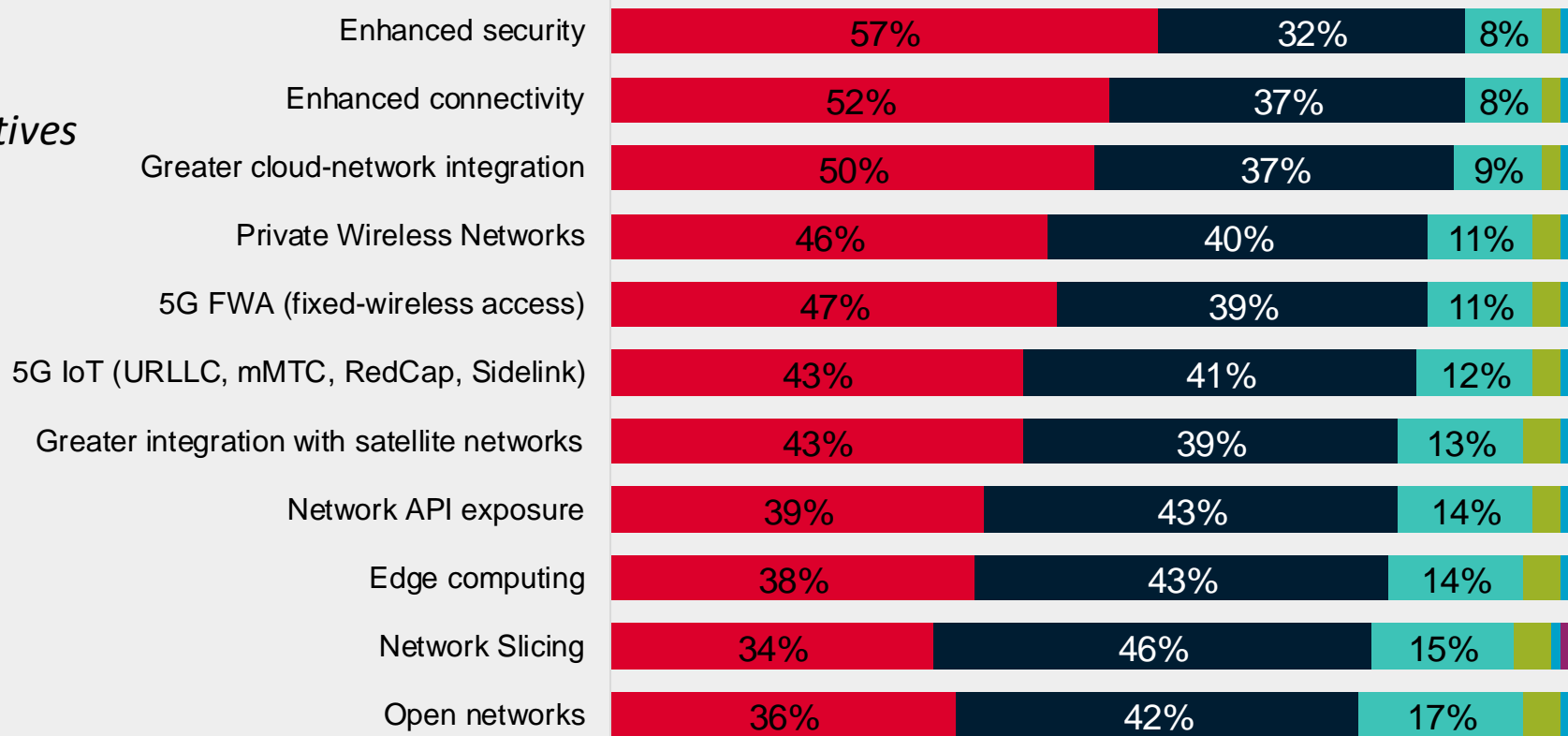
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Network API Use Cases:

Which network APIs and API use cases are most important?

	GLOBAL	USA
Fraud Prevention	1	1
Network Performance Optimization	2	5
Online Payments, and Billing	3	2
Customer Service Personalization	4	3
Device Status	5	4
IoT Remote Control	6	6
Content Delivery	7	7

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Digital Transformation: what about Telco Priorities?
connectivity in support of cloud services is spot-on – but edge can't be forgotten

Enterprise Services:

Top Telco Priorities for B2B Success

Category	Percentage
5G Connectivity	91%
Private Wireless	79%
Cloud Services	76%
IoT Services	73%
Security Services	73%
Managed Services	72%
Vertical Applications	71%
Big Data / Analytics	49%
Edge Services	44%

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What does it all mean?

For Suppliers

- follow the demand and spending
- educate the laggards
- link connectivity to
  - security
  - cloud
- focus on top line. educate on bottom line
- help telcos help themselves

For Operators

- follow the demand and spending
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For Enterprise CIOs

- leverage industry's interest in pushing 5G into the enterprise
- look to 5G beyond connectivity
- think end-to-end security
- think Network APIs for performance
- don't ignore FWA

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