

INSIGHT SPOTLIGHT

Over the course of several analyses this year, we've examined the relationship between 5G networks, enterprise services, network/service performance visibility and service-oriented SLAs. **First**, we outlined the importance of enterprise services and standalone (SA) 5G services to operator strategies. **Next**, we detailed the importance of service guarantees to future enterprise services. **Following this**, with input from leading operators focused on enterprise, we highlighted current views around enterprise SLAs and network performance requirements, particularly as services integrate diverse

cloud and edge assets – this last point was the focus of our [latest analysis](#).

For most operators, enterprise services are a strategic endeavour – which includes expanding existing offers or moving into new markets – so it is important to understand the view of operators as a whole (and not just those focused on enterprise). To end this series of analyses, we therefore examine the results of a recent global survey of 100 operators to get a broader outlook on enterprise services, SLAs and service visibility.

Analysis

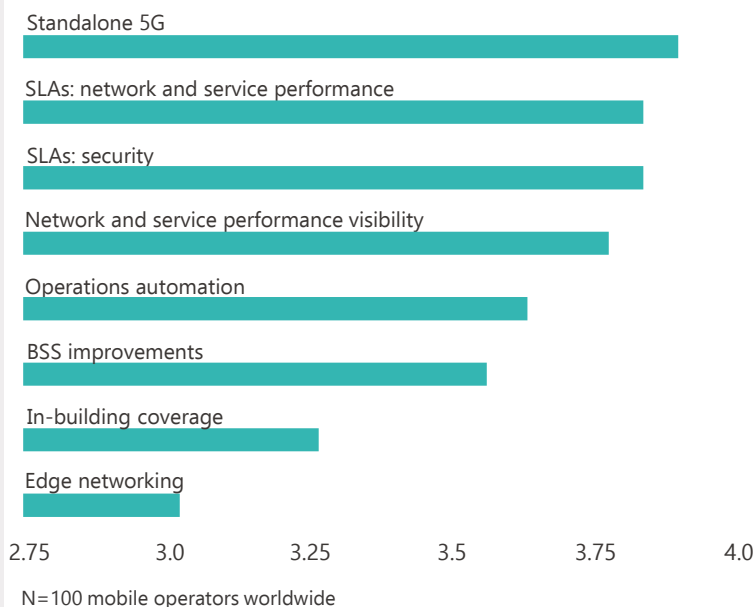
Gaining a holistic view on enterprise services and SLAs

The GSMA Intelligence Operator in Focus series of research aims to deliver comprehensive, holistic insights into operator priorities and strategies; [our latest research](#) sampled 100 operators around the world to understand operator views on enterprise services. Among operators that currently offer mobile, fixed, IT integration and vertical services to enterprises, there is a clear focus on 5G: of those we surveyed, 47% plan to sell 5G to enterprises by the end of 2020 and 90% by the end of 2022.

Beyond basic 5G connectivity, the importance of SA 5G was equally apparent – it was rated the technical capability most crucial for success in the enterprise sector. A close second to SA 5G was the ability to offer SLAs (security and performance) and network/service visibility; this surpassed hyped capabilities such as edge computing and in-building wireless by a significant margin.

Source: GSMA Intelligence Operators in Focus survey 2020

How important are the following to your success in enterprise services?
Scores range from 1 (lowest) to 5 (highest)



Enterprise experts not alone in understanding SLA importance

When we compare the insights from operators around the world with those advanced in their enterprise service strategies, we see strong similarities in terms of the focus on 5G in enterprise and SA 5G. Both groups also agreed on the importance of offering SLAs as a part of any enterprise service strategy.

Yet, as much as they understand the need for SLAs, half the enterprise experts we spoke with do not believe they will need to significantly change the way they currently offer SLAs with regard to the level of granularity or the performance reported. And there's no reason to believe that the broader universe of operators would have a different perspective.

Indeed, our survey results concerning views on billing and self-service capabilities suggest that the implications of enterprise 5G rollout aren't fully understood by all operators. Despite the fact that new enterprise verticals may require new billing models, only 18% of operators consider a fit-for-purpose business support system (BSS) as key to effectively selling into the enterprise sector. Similarly, only 32% highlight self-service capabilities as important – despite the role they would play in scaling service offers – in contrast to 60% of the enterprise experts.

What next?

This is the last in our series of analyses examining enterprise 5G and the impact on SLAs and network/service visibility.

What's next for the market, though, is clear. SA 5G will be rolled out, often to serve new enterprise service offers, and operators will learn how new SA capabilities (e.g. slicing and ultra-reliable low-latency communications) will fit into their current enterprise services and processes, which will often have an impact on committed service and network performance. Some operators will update their SLA offers to reflect this, while others will look to expose service and network performance data to allow enterprises to track performance on a self-service basis. Judging by the difference between enterprise-focused operators and the rest of the market when it comes to views on such capabilities, many operators will likely need to rethink plans for self-service capabilities for enterprise customers – those that do not may find themselves at a competitive disadvantage.

Implications

Mobile operators

- **Don't wait for SA** – SA 5G will deliver the advanced service capabilities that will make granular enterprise SLAs more relevant. But that doesn't mean operators can afford to wait for SA to begin their 5G enterprise service or SLA planning. Service strategies must be developed in the near term with a full view of SA plans in the longer term. Assurance vendors (which will help deliver and report on SLA performance) must be brought into that planning.
- **Don't forget BSS** – Operators may make granular SLAs and service visibility integral parts of enterprise 5G, bundling them into the price of the services in order to gain competitive traction. They may also decide to monetise performance guarantees and visibility. In either case, new billing models will be required. While operators might be correct in believing that enterprise success does not require a fundamentally new BSS, it will require a focus on new BSS capabilities that are tightly coupled with SLA and performance operations.
- **Compete on SLAs and visibility** – The vast majority of operators believe that offering SLAs will be crucial to the success of their enterprise sales, but it's unclear how many plan to evolve existing SLA structures in line with the new capabilities that 5G brings. This presents a marketing and sales opportunity for any operator that can provide clear service and network performance insights to enterprise customers.

Enterprises

- **Look for operators serving holistic SLAs** – If operators are correct in their thinking, their enterprise customers will be looking for security as well as network and service-based SLAs. While the requirements for security may differ from those of network and service SLAs, enterprises should look for operators serving these together in order to ensure consistency of delivery and reporting/auditing.
- **Take a complete view on networks** – Enterprise services will be delivered from a diverse set of sources and players: edge and centralised assets, telecoms operators and public cloud players. To get a complete picture of service performance, enterprises will need to gain an overall view of the networks delivering these services, which necessitates holistic SLAs and insights from providers.
- **Evaluate needs** – Any decisions an enterprise makes about 5G, network architectures or the requirements driving SLAs going forwards need to be based on a clear understanding of service and business requirements. This may sound obvious, but with 5G rhetoric running high, enterprises need to understand what 5G brings that is critical to meeting their objectives. These requirements then need to form the foundation of SLA specifications and negotiations with operators.

About this research

This research forms part of an Insight Spotlight series focussed on the market demand, requirements and technology solutions around 5G network and service performance visibility in support of enterprise services.

In conjunction with service assurance vendor EXFO, and with support from a number of mobile network operators around the world, the research aims to shine a light on a business and technology asset key to delivering 5G enterprise services but less publicised than some 5G capabilities. In doing so, the ultimate goal of the research is to help the industry execute on the 5G opportunity it has already recognised.

Related reading

[IoT connections forecast: the rise of enterprise](#)

[5G reality check: the expected and unexpected](#)

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