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Global operators show split strategies for 5G deployment

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Mobile operators are split on their 5G deployment strategies to manage subscriber data but agree on key factors such as Total Cost of Ownership (TCO), data ownership and edge services.

These are some of the key findings from a new Enea survey, conducted independently by the Technology Innovation Council who interviewed mobile operators globally*.

42% of operators are looking to deploy multi-vendor 5G cores, yet, in response to a different question, 1 in 3 (33%) want to stay with their incumbent vendor to manage subscriber data. Some operators are turning to new frameworks for managing their 4G and 5G cores, however others decide strategies on a use case basis. Most operators interviewed recognized the benefits of open, multivendor architecture – but revealed that their concerns were no single point of contact and support (36%), interoperability (30%) and a lack of operational tools (19%).

Unsurprisingly, cost worries loomed large for many operators taking part in the study. Total Cost of Ownership is the key consideration when it came to selecting 5G subscriber data management (SDM) technology, especially for operators sticking with an incumbent vendor. And 39% of these mobile operators had experienced rising costs along with vendor lock-ins and inflexibility because of the existing vendor. Yet while 5G gives operators the freedom to use multiple vendors, 83% were concerned about interoperability in multi-vendor architecture.

Interoperability is a key attribute of 5G multivendor architectures, but operators are currently divided on this. What's more, when it comes to interoperability, both those opting for multivendor and those staying with incumbent vendors place a higher priority on open standard interfaces than full 3GPP compliance.

The mixed picture with 5G strategies was also reflected in cloud migration timelines which showed another split result. 66% of operators that are migrating to multivendor environments have also begun to move to the cloud. By comparison, 41% of those using their incumbent vendor have one foot in the cloud – revealing that nearly half of operators with incumbent vendors are not utilizing the benefits of cloud technology.

Despite the stark contrasts in deployment and cloud strategies, there is a clearer picture about utilizing the edge. More than 90% of operators are leveraging their edge capabilities. 31% are already piloting use cases and 29% are using the edge to reduce latency on 5G control functions, while others are using it to develop mesh architecture and scale up with hybrid clouds.

Stephanie Huf, SVP and CMO of Enea explains: “This survey has uncovered that there is cautious pragmatism amongst many operators. For example, many want their technology to interwork to standards, but they see full standards compatibility of lesser importance. Operators are being practical and while many appreciate how multi-vendor architecture can transform networks – they want to ensure that they have the right skillsets in place and have complete control over their networks, subscriber data and total cost of ownership before they take the plunge.”