



Technology Insights...

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J.Gold Associates, LLC. Northborough, MA 01532 USA
www.jgoldassociates.com +1-508-393-5294
Research, Analysis, Strategy, Insight

T-Mobile for Business Targets Businesses for 5G Service and More

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“... We believe that T-Mobile is well positioned to take on the other US carriers in business and win many enterprise customers. Its large network spectrum holdings and 5G leadership, together with a sense of urgency in tackling the business market and putting programs in place to accomplish it, make T-Mobile a compelling choice for many organizations....”

T-Mobile has been an extremely aggressive provider of mobile services in the US over the past several years, which has propelled it from a me-too position into one of leadership from both the number of subscribers as well as the service capabilities it provides. Being the Un-carrier and doing things differently has caught on and T-Mobile has created a leading position in the market. But while it's been quite successful in the consumer space, it lags behind both Verizon and AT&T when it comes to being a player in business. With the major opportunity in business uses of 5G technology coming into play, T-Mobile wants to change and become the Un-Carrier for business as well as consumer. But to do so, it needs to be less focused on “gimmicks” and more focused on quality of service that is mission critical to business users. We believe it can do so.

T-Mobile has created the largest 5G network in the US, based on its significant spectrum holding, particularly in the mid-band where it dominates. Indeed, T-Mobile is currently alone in offering a 5G Stand Alone network that enables it to offer services that 5G networks built on an LTE backbone can't. 5G SA is a requirement to offer many potential advanced services like network slicing, QoS for critical communications, much improved latency, etc. They have added services targeted at businesses, like Apple Business Essentials to manage the vast number of Apple devices in the business community. And they have pursued an aggressive roll out of Fixed Wireless access (FWA) that is attractive to not only consumers, but many business users as well. The service is available nationwide for organizations of all sizes, but is often the only option available to those businesses in underserved connectivity locations (20% of rural businesses in the US do not have the ability to obtain Internet access).

Providing FWA connectivity on a business-class router (e.g., Cradlepoint) offers a level of service beyond what many equivalent consumer-oriented FWA services provide, and is also attractive to enterprise customers that have a need for more manageable and higher performance routers. The service includes router pre-configuration and drop-ship capability for remote fixed locations like a branch office, work from home offices, etc. This service relieves the deployment burden from corporate IT. And T-Mobile partnered with Deutsche telecom to offer worldwide IoT connectivity for the many companies that need to have cross-border and nearly worldwide support (e.g., shippers) while being managed by a streamlined contract and single point of contact. Further, because of their large spectrum holdings, they are able to offer companies a hybrid network capability bridging both Private and Public 5G access for employees and

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devices that expands enterprise capabilities beyond its own walls.

Next generation business processes require both fast and reliable connectivity along with low latency and guaranteed services. New era solutions like AI enhanced systems (e.g., remote problem diagnosis) require extremely low latency to function properly as well as fully reliable deterministic communications. Further, network security is of utmost importance in many applications (e.g., remote healthcare, time critical sensing, manufacturing/production lines, etc.) that 5G is particularly good at compared to other options like public WiFi, which is prone to hacking and spectrum interference. T-Mobile is extending its security capability even further by implementing SD-Wan functionality to secure Edge computing deployments. Edge will be a critical component of most enterprise computing requirements within the next 2-3 years. Finally, “as a Service” models are becoming major requirements in many industries and T-Mobile has a vision of how to make connectivity an “as a service” reality. This is particularly important as a “one size fits all” approach does not work very well in business environments where customized capabilities are prevalent. This will be an important competitive product requirement for T-Mobile as we expect most providers to offer such solutions.

Bottom Line: We believe that T-Mobile is well positioned to take on the other US carriers in business and win many enterprise customers. Its large network spectrum holdings and 5G leadership, together with a sense of urgency in tackling the business market and putting programs in place to accomplish it, make T-Mobile a compelling choice for many organizations. We expect T-Mobile to be aggressive in rolling out new business-oriented services and capabilities in the next 18-24 months. While it is “coming from behind” in business (much as it did in consumer), we expect that in the next 1-2 years, T-Mobile will become a primary go-to for business related connectivity. Businesses of all sizes should explore what capabilities T-Mobile can offer today but also explore what they will offer in the future to enhance business operations and keep operating costs reasonable.



J.Gold Associates, LLC.

6 Valentine Road
Northborough, MA 01532 USA

Phone:
+1-508-393-5294

Web:
www.jgoldassociates.com

Email:
info@jgoldassociates.com

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