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# 5G TECHNOLOGY TRENDS

*A Survey of 5G Stakeholders in  
Telecommunications*

MARCH 2022

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# INTRODUCTION

**“How will 5G change the world?” Pose this question to a dozen telecommunications experts and you may receive a dozen different answers.**

Four years ago, telecommunications leaders already had varying opinions on 5G’s possible applications and the extent of its potential impact. Connected vehicles, an expanded industrial Internet of Things (IoT) and the advent of remote healthcare were just some of the functions the nascent technology could enable. Since then, 5G has grown in complexity. Instead of three main benefits over 4G — faster speeds, lower latency and the ability to hold many more IoT connections simultaneously — 5G’s “toolbox” now contains at least 11 different capabilities for providers to explore and develop.

Those new tools create an even wider array of opportunities for 5G — and thus more ways for telecommunication leaders to differ on what the future of 5G applications could look like. Still, no one can say for sure yet if 5G will be a disruptor or just an elevation of 4G.

One point of agreement has been that 5G’s promise opens new opportunities for non-traditional players to enter the telecommunications market through the disaggregation of hardware and software via open interfaces and cloudification — also known as Open Radio Access Network, or Open RAN. With Open RAN, flexibility,

innovation and competition could increase; every company is supplied and can be a supplier.

Could Open RAN be the future of 5G? What are the existing hurdles for telecommunications companies working to deploy 5G? Aiming to answer these questions and get a feel for the current and future state of the industry, we fielded an online survey to 193 telecommunications stakeholders responsible for strategy, planning, technology evaluation, development, operations, engineering and product management.

All participants were directly involved in development, implementation, or adoption of 5G technologies at leading telecommunications companies in North America, Europe, the Middle East and Asia-Pacific. The survey posed several questions about the adoption, opportunities and challenges associated with 5G.

*Note: As you review the results, please keep in mind that percentages may not add up to 100 due to rounding.*



# KEY FINDINGS

## 5G IS ON THE CUSP OF TRANSFORMING COMMUNICATIONS

- **64%** of respondents believe 5G will become mainstream in the next one to three years.
- Almost **two-thirds (65%)** expect 5G to be a superior technology that will dramatically transform telecommunications, up from 49% in 2018.
- **59%** strongly agreed that the transition to 5G will create opportunities for new telecommunications companies, but **only 42% strongly believe** the next “killer app” will propel 5G’s true potential and consumer interest.
- **Financial services** is the industry with the most potential to be impacted by 5G solutions.
- **More than half (58%)** of respondents believe businesses will benefit from 5G’s “killer app” first.
- **87% of respondents** believe business applications will adopt 5G solutions first.

# KEY FINDINGS

## AS 5G TECHNOLOGY DEVELOPS, HURDLES REMAIN

- **Business model challenges** are the most difficult 5G hurdle for organizations to overcome.
- **Creating subscription models for 5G** is the most difficult business challenge respondents face in developing and implementing 5G.
- **Identifying the physical locations to install 5G equipment** is the most difficult organizational challenge respondents reported in developing and implementing 5G.
- **Availability of spectrum**, or lack thereof, is the most difficult challenge respondents face in developing and implementing 5G.
- **84%** of companies that face user or customer challenges believe 5G is a superior technology that will transform telecommunications.
- **Companies facing operational challenges** are split between viewing 5G as transformative and an incremental advance over 4G that will create some changes for telecommunications.

# KEY FINDINGS

## OPEN RAN PRESENTS NEW OPPORTUNITIES AND CHALLENGES

- **More than half (55%)** of respondents are seriously considering an Open RAN strategy.
- **57%** believe Open RAN will be ready to be deployed in the next two years.
- **81%** expect Open RAN will reduce CAPEX, including 100% of companies who already have an Open RAN strategy in place.
- **85%** expect Open RAN will reduce OPEX, including 100% of companies who already have an Open RAN strategy in place.
- Almost all respondents (**93%**) believe 5G will foster partnerships between service providers and software or web services companies.
- More than three-quarters (**79%**) of companies expect variability in network performance (call quality, call drops, throughput) occasionally or often when first rolling out an Open RAN network.
- **39%** of companies facing business model challenges expect variability in network performance often when first rolling out an Open RAN network, but 60% believe they'll never see variability.
- **64%** of respondents are willing to accept a higher incidence rate in exchange for the financial and operational benefits of Open RAN.
- Less than half (**44%**) believe hyperscalers (like Amazon, Microsoft, Alibaba and Google) fit into their Open RAN strategy, but two-thirds of companies that have already implemented an Open RAN strategy do believe hyperscalers have a place.
- The need for **fixed wireless** and the **industrial Internet of Things** will drive broad 5G adoption over the short term and over the long term.



**5G IS ON THE  
CUSP OF  
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COMMUNICATIONS**

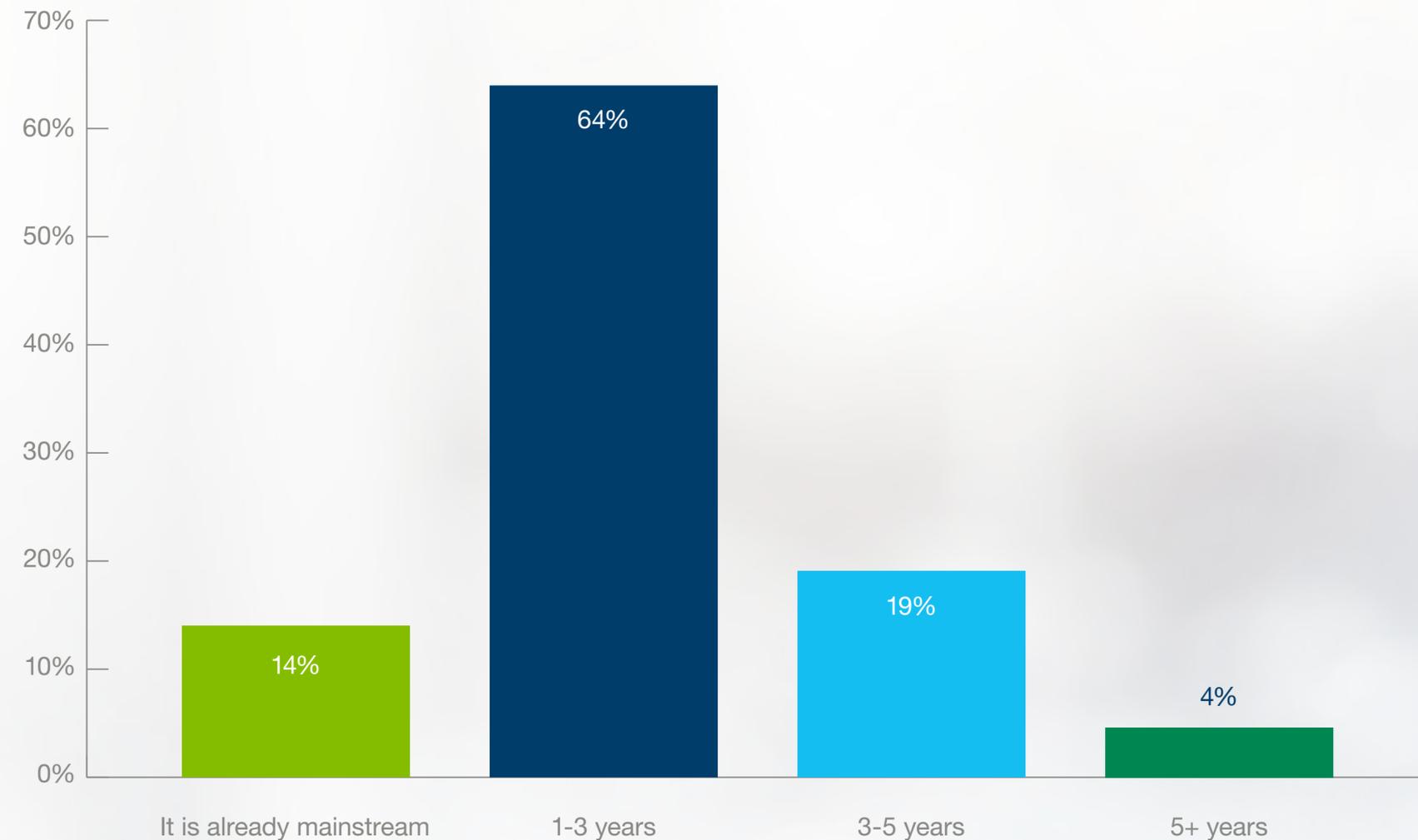
# 5G WILL SOON BECOME MAINSTREAM

Our survey participants make it clear that 5G is the future; for the 14% of our respondents who said 5G is already mainstream, that future is here.

But the vast majority of telecommunications companies (64%) agree that it will take another one to three years before the technology is widely adopted.

Just under a fifth (19%) think it could take between three and five years for widespread uptake, but very few believe rollout will go past the five-year mark.

## In your opinion, how long will it take for 5G to become mainstream?



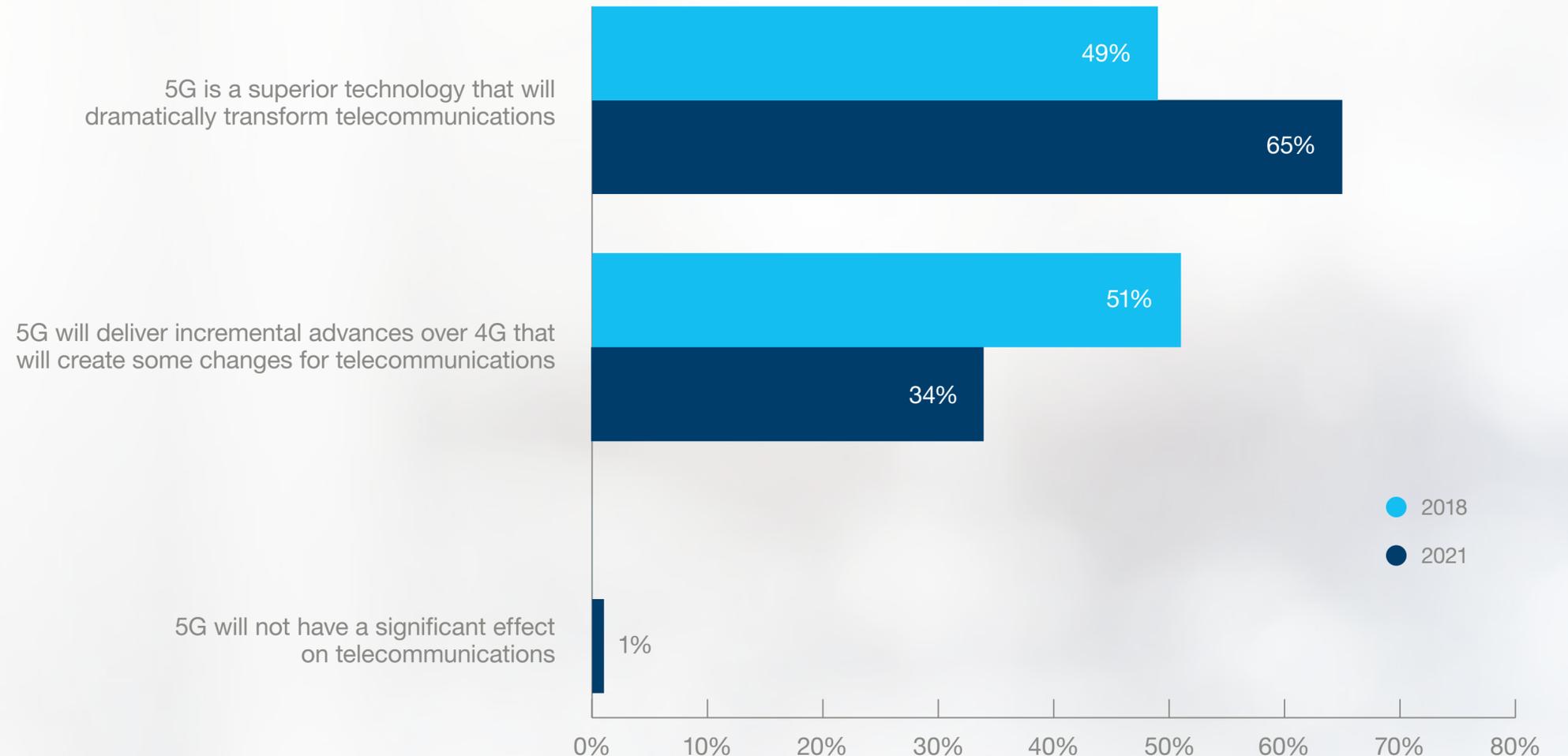
# 5G IS INCREASINGLY SEEN AS TRANSFORMATIVE

Though 5G wasn't as widely deployed between 2018 and 2021 as some may have anticipated, the slower pace allowed the underlying technologies, spectrum and hardware to be developed to support the cutting-edge applications 5G is expected to power.

As such, 65% of 2021 survey respondents said they believe 5G is a superior technology that will dramatically transform telecommunications, up 16% from 2018.

Accordingly, only 34% said 5G will deliver incremental advances over 4G, a 17% drop from 2018.

## Which of the following statements most closely represents your expectations/experiences for 5G?



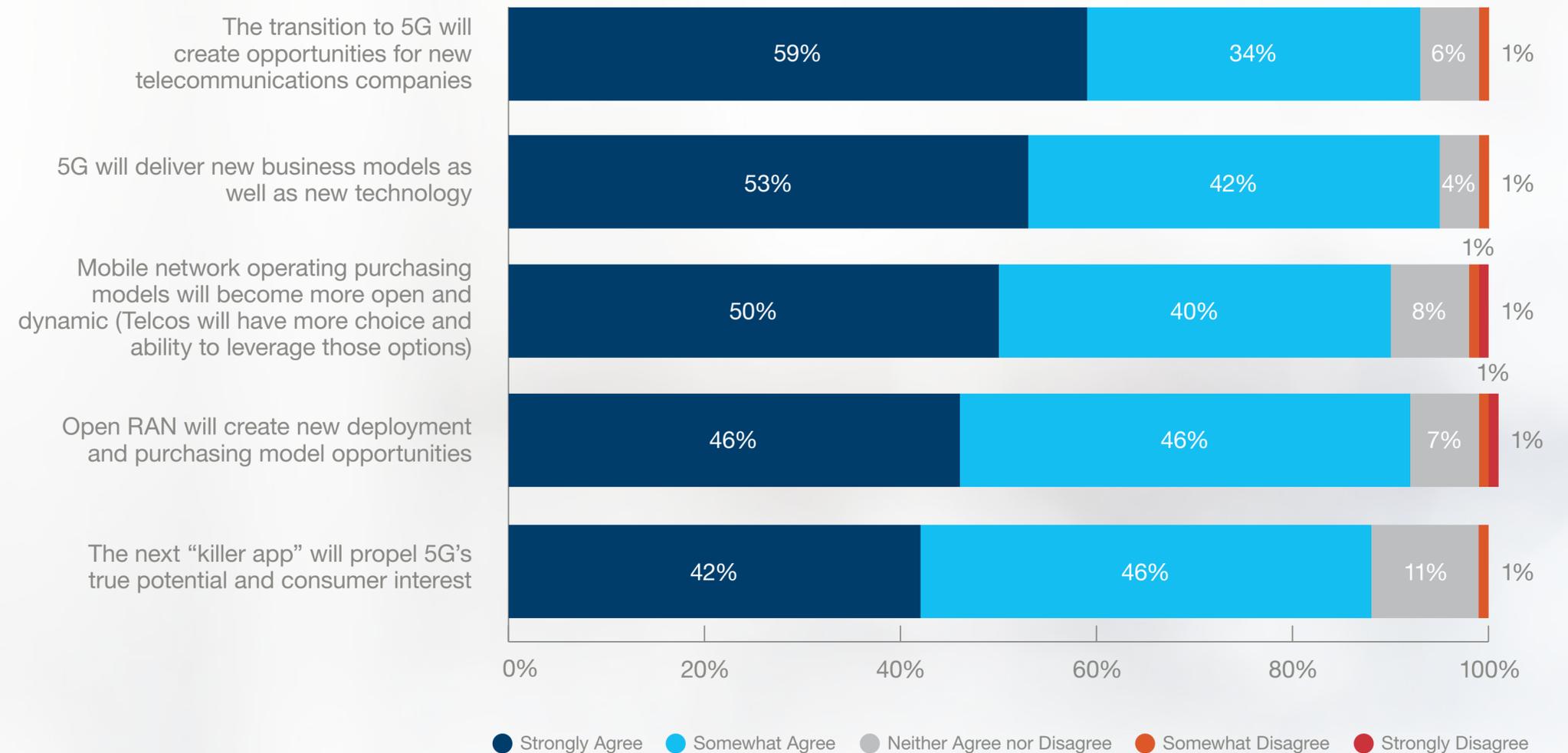
# TELCOS BELIEVE 5G WILL CREATE NEW OPPORTUNITIES, BUT THEY'RE NOT SOLD ON THE "KILLER APP"

The complexity of 5G and its capabilities has opened the door to new players in the telecommunications market that can develop network and user equipment like handsets, radios, small cells and customer premise equipment to make full use of the mobile network.

More than half of survey respondents (59%) said the transition to 5G will create opportunities for new telecommunications companies, while 53% said it will deliver new business models. Key to these new business models will likely be the yet-to-be-invented "killer app," which has been hailed as turning point in 5G's development.

However, only 42% of survey respondents strongly agreed that the "killer app" will propel 5G's true potential and consumer interest.

## Please indicate your opinion of the following statements:



# FINANCIAL SERVICES COULD BENEFIT THE MOST FROM 5G

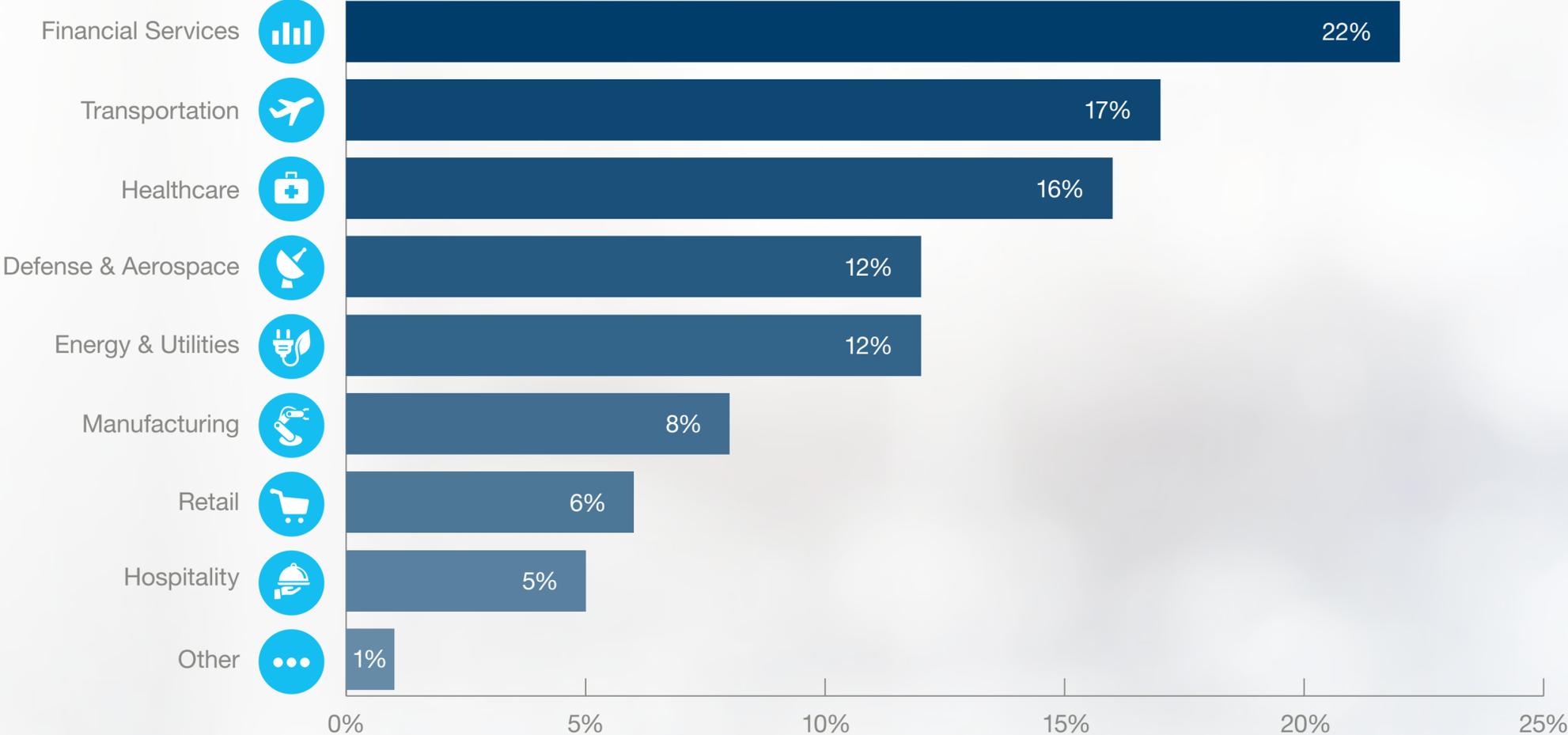
The 4G era introduced businesses and consumers to the idea of a highly connected, more personalized world; 5G could make that a (virtual) reality.

More than a fifth (22%) of respondents believe the financial services industry has the most potential to be impacted by 5G solutions. The rise of fintech, including cryptocurrency, could benefit from mass adoption of 5G.

As automotive manufacturers develop increasingly connected vehicles and look toward the future of autonomous vehicles, 17% of respondents said transportation has the most potential to be impacted by 5G solutions.

Another 16% said healthcare could be most impacted. Digital healthcare, from wearables to connected auto-injectors, is a reality for many companies; 5G could help get patients and providers connected quickly and seamlessly.

What industry has the MOST potential to be impacted by 5G solutions?

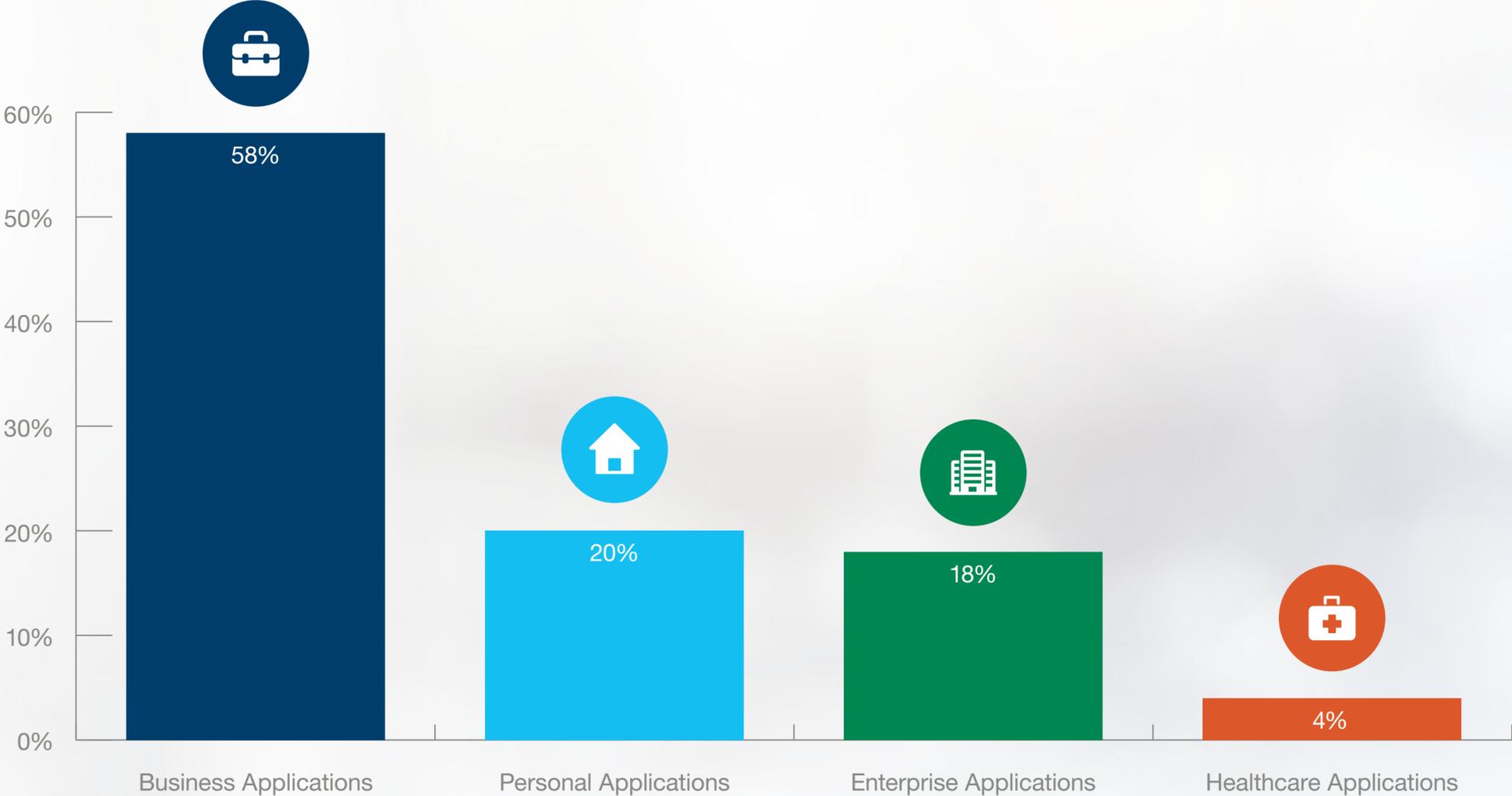


# BUSINESSES WILL SEE THE KILLER APP FIRST

Unlike 4G's consumer-targeted "killer app" — streaming mobile video — 5G's will likely benefit businesses the most.

More than half (58%) of our survey respondents said they believe the next "killer app" will come from the business world. Only a fifth (20%) said it will be a consumer-facing application.

What industry do you believe will benefit most from the next "killer app"?

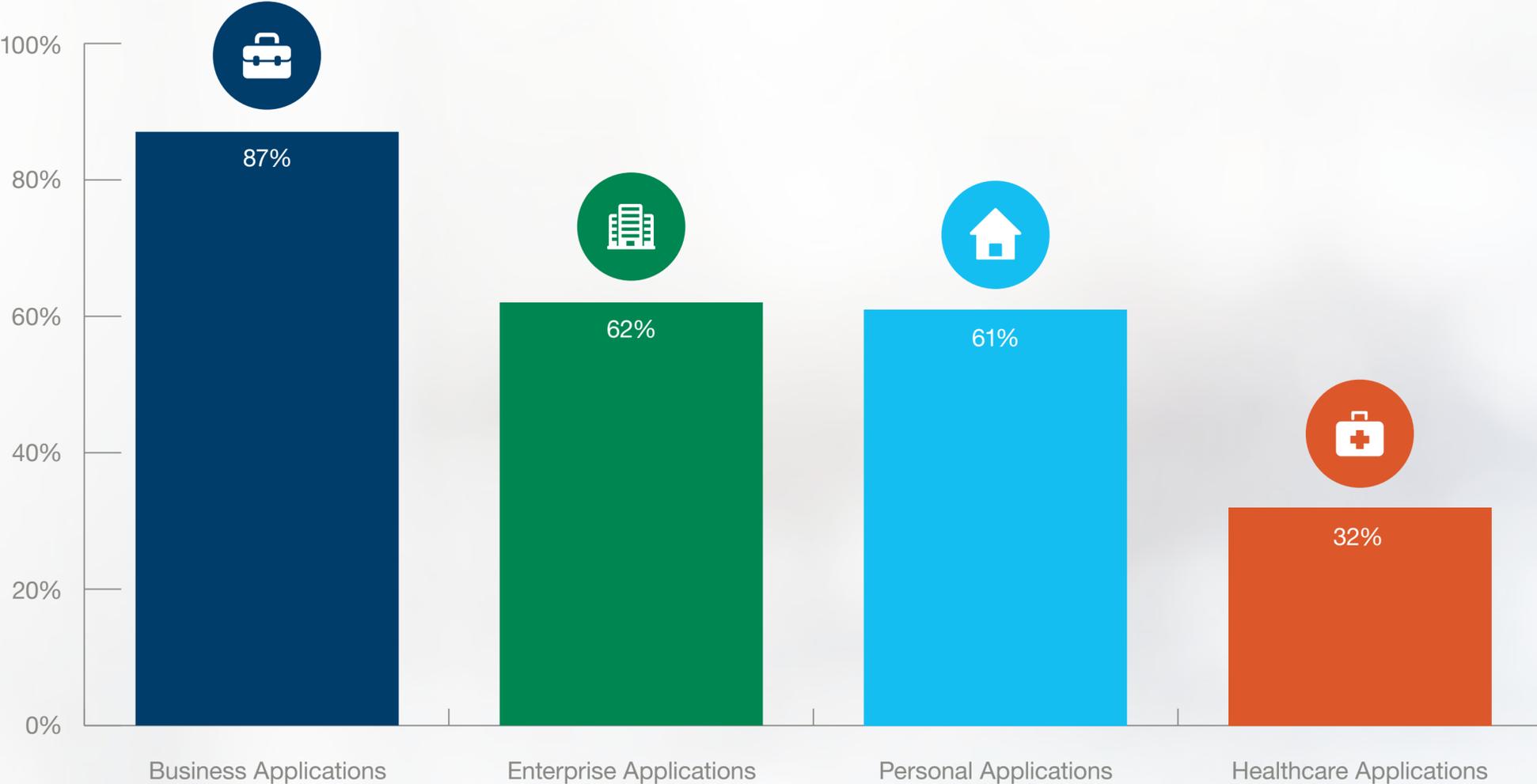


# BUSINESSES WILL ADOPT 5G FIRST

If businesses will benefit most from 5G's first big "killer app," it aligns that the overwhelming majority (87%) of respondents believe that business applications will adopt 5G solutions first.

Approximately the same number of respondents believe enterprise and personal applications will adopt 5G first (62% and 61%, respectively), while less than a third think healthcare apps will be first to the new network.

What types of applications do you expect to adopt 5G solutions first? Choose all that apply.





**AS 5G  
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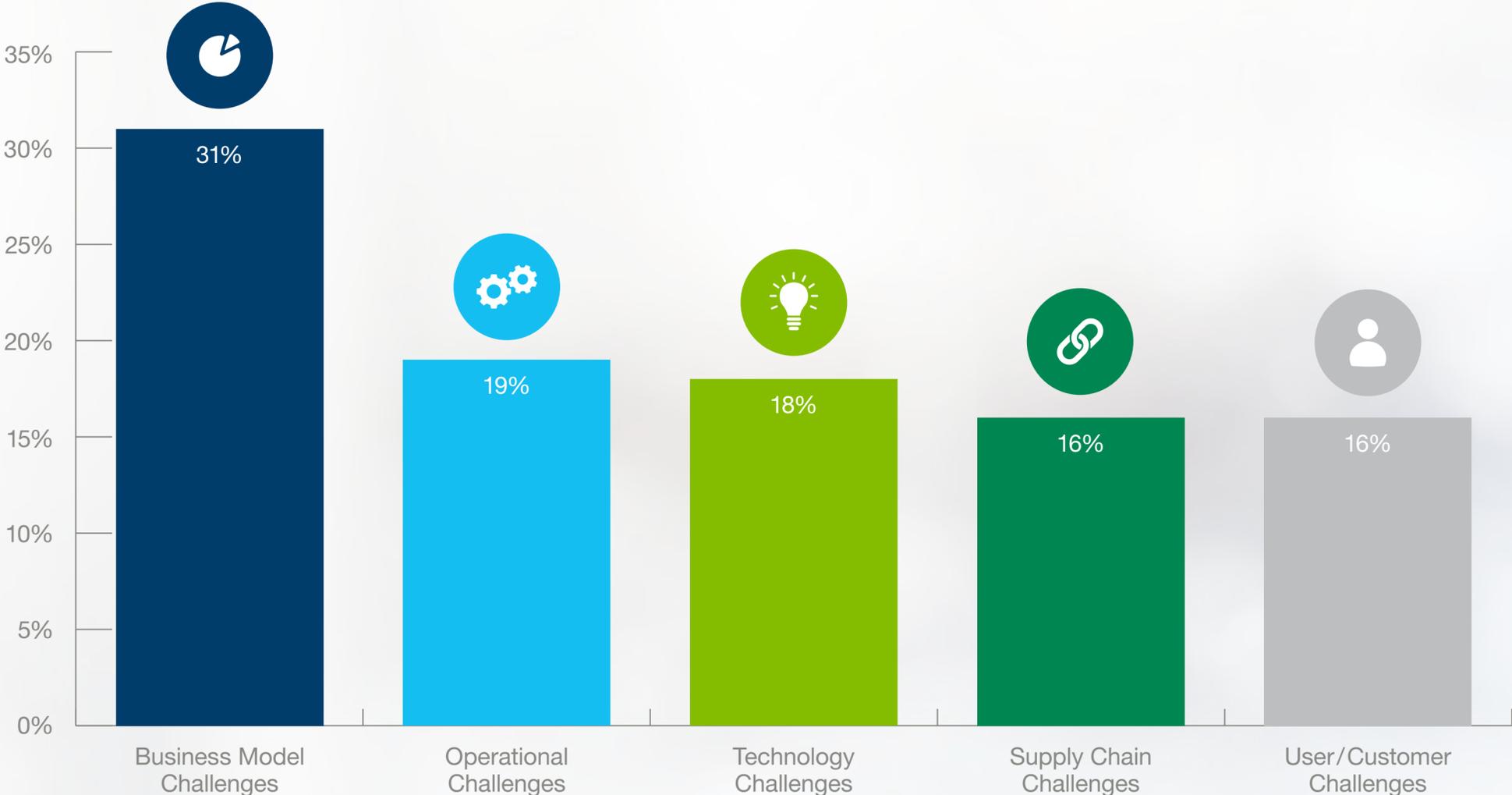
# DETERMINING THE 5G BUSINESS MODEL IS A CHALLENGE

The long, slow rollout of 5G has given telecommunications companies plenty of time to work through the logistical challenges it presents. Only 19% of respondents said operational challenges were the most difficult aspect of 5G to solve, while 18% said technology challenges were their biggest hurdle.

Also, as 5G has not been widely deployed yet, supply chain and customer challenges have been relatively few. However, indicated by 31% of respondents choosing business models as their biggest challenge, telecommunications companies have struggled to determine how best to sell 5G to customers.

Without proven use cases, customers have so far been hesitant to invest in the new technology — forcing some telcos to rethink their 5G business models going forward.

In your opinion, what category of 5G challenges is the MOST difficult for your organization to solve?

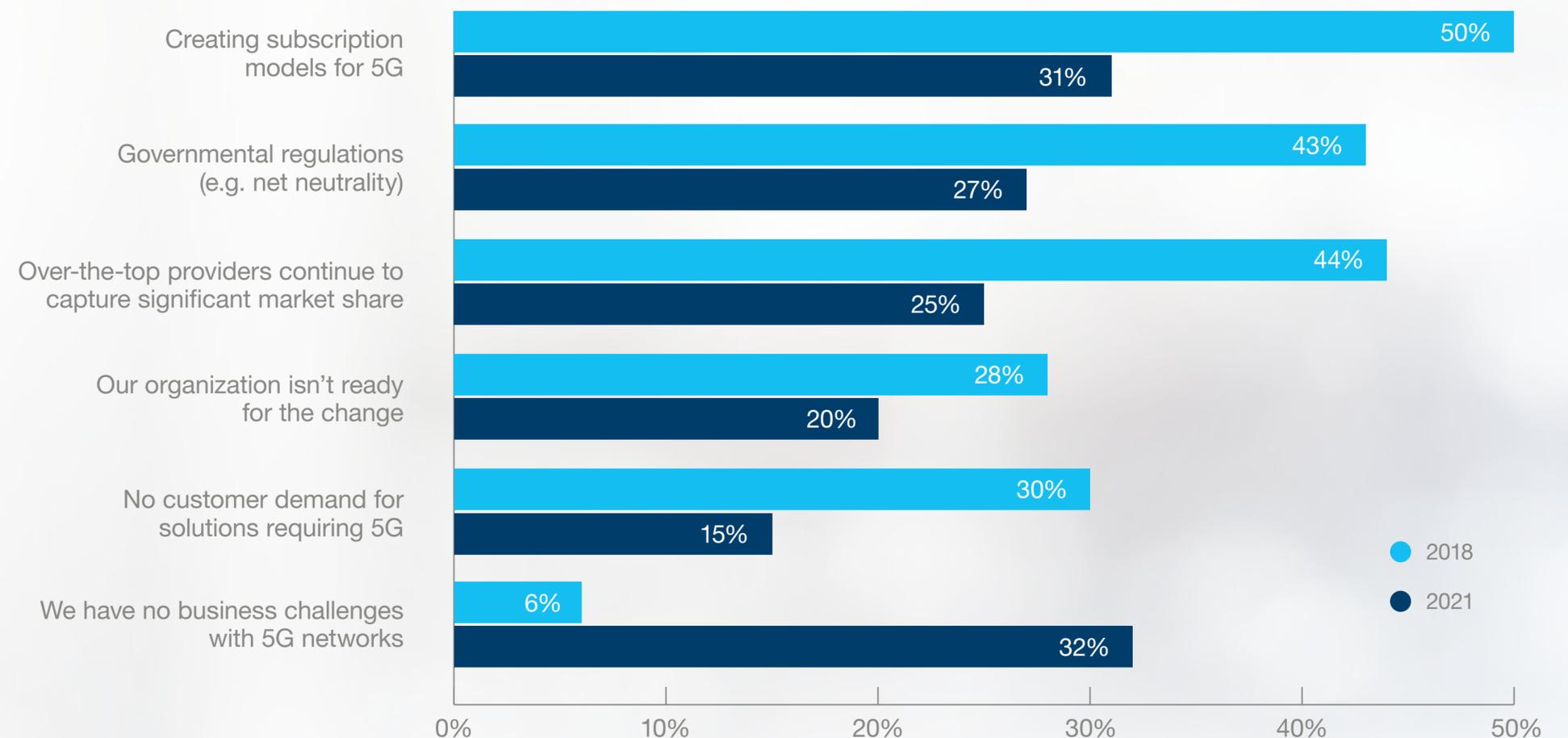


# SUBSCRIPTION MODELS ARE TOP 5G BUSINESS CHALLENGES

Of the 68% of respondents who reported business challenges in developing or implementing 5G, close to half (31%) said creating subscription models for the new network was on their list. Determining how much consumers are willing to pay for a so-far unproven service has been a challenge for telecommunications companies, but that has already changed significantly between 2018 and 2021 and could change even more drastically in 2022.

In January 2022, a wide new swath of mid-band, or C-band, 5G was turned on for tens of millions of mobile users in the U.S., with more to come throughout the year. Globally, CCS Insights found that 5G connections are expected to double between 2021 and 2022, from 637 million to 1.34 billion. Elsewhere, roughly a quarter of respondents said governmental regulations and over-the-top providers capturing significant market share (27% and 25%, respectively) were business challenges to developing 5G networks.

**Which of the following BUSINESS challenges does your organization face in developing or implementing 5G networks? Choose all that apply.**

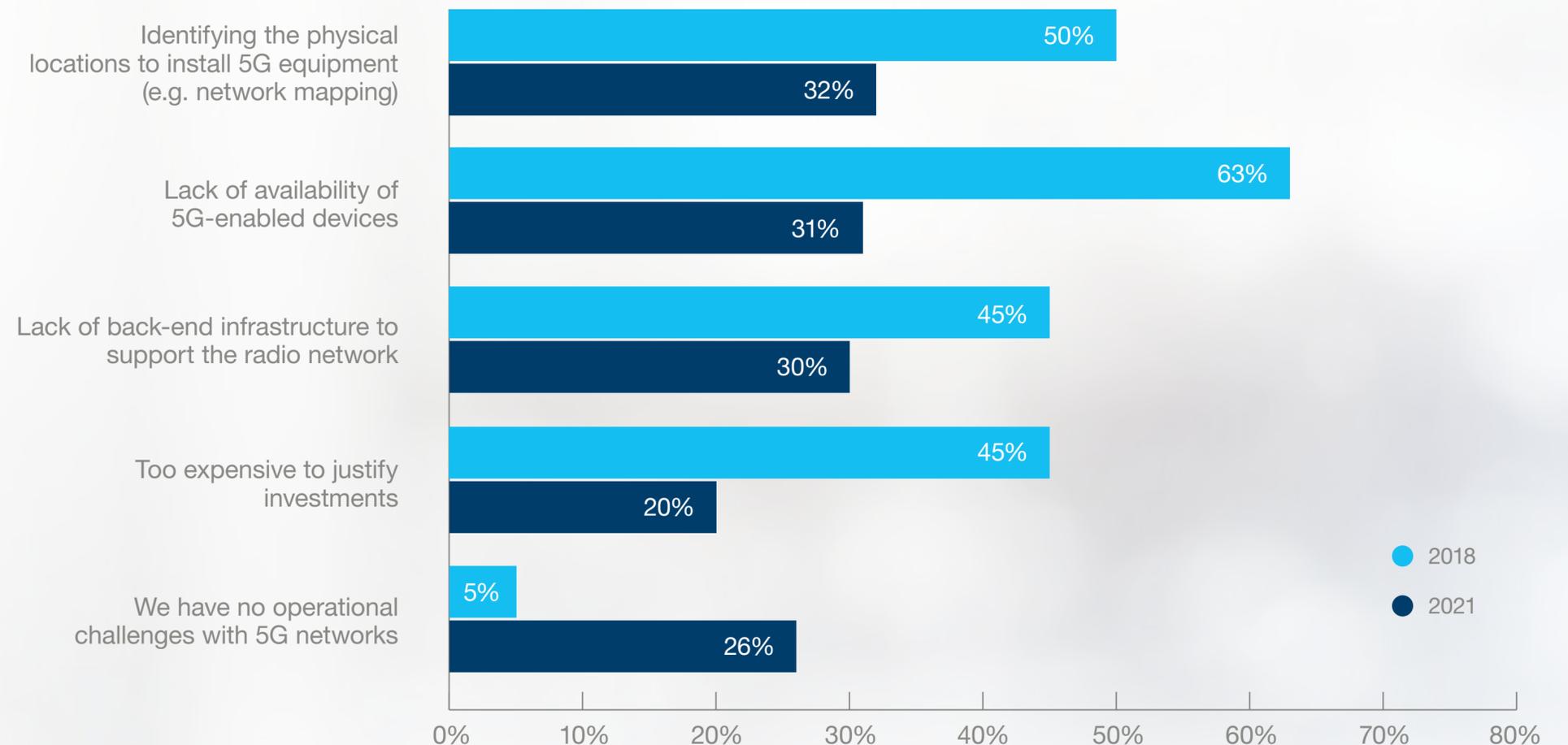


# NETWORK MAPPING AND LACK OF DEVICES ARE THE BIGGEST OPERATIONAL CHALLENGES TO 5G

Across the board, operational challenges have eased significantly since 2018. However, almost a third (32%) of respondents still reported challenges with identifying physical locations to install 5G equipment. This became an acute issue for radio towers near airports when new C-band spectrum was turned on in early 2022. Airplane instruments operate on the same radio frequencies as C-band, with just a few hundred megahertz separating the slices of spectrum used by planes and 5G. Telecommunications companies agreed not to turn on the new frequency within two miles of airports for six months while airlines upgraded their instruments to safely filter out the 5G spectrum.

Even simpler, high-band, or millimeter wave, 5G cannot travel far distances or pass through solid walls, so telcos must be strategic in their placement of those small cells. Additionally, 31% of respondents said the lack of availability of 5G-enabled devices is an operational challenge for their organization. This is likely to change as spectrum is deployed and consumers begin purchasing 5G devices.

**Which of the following OPERATIONAL challenges does your organization face in developing or implementing 5G networks? Choose all that apply.**

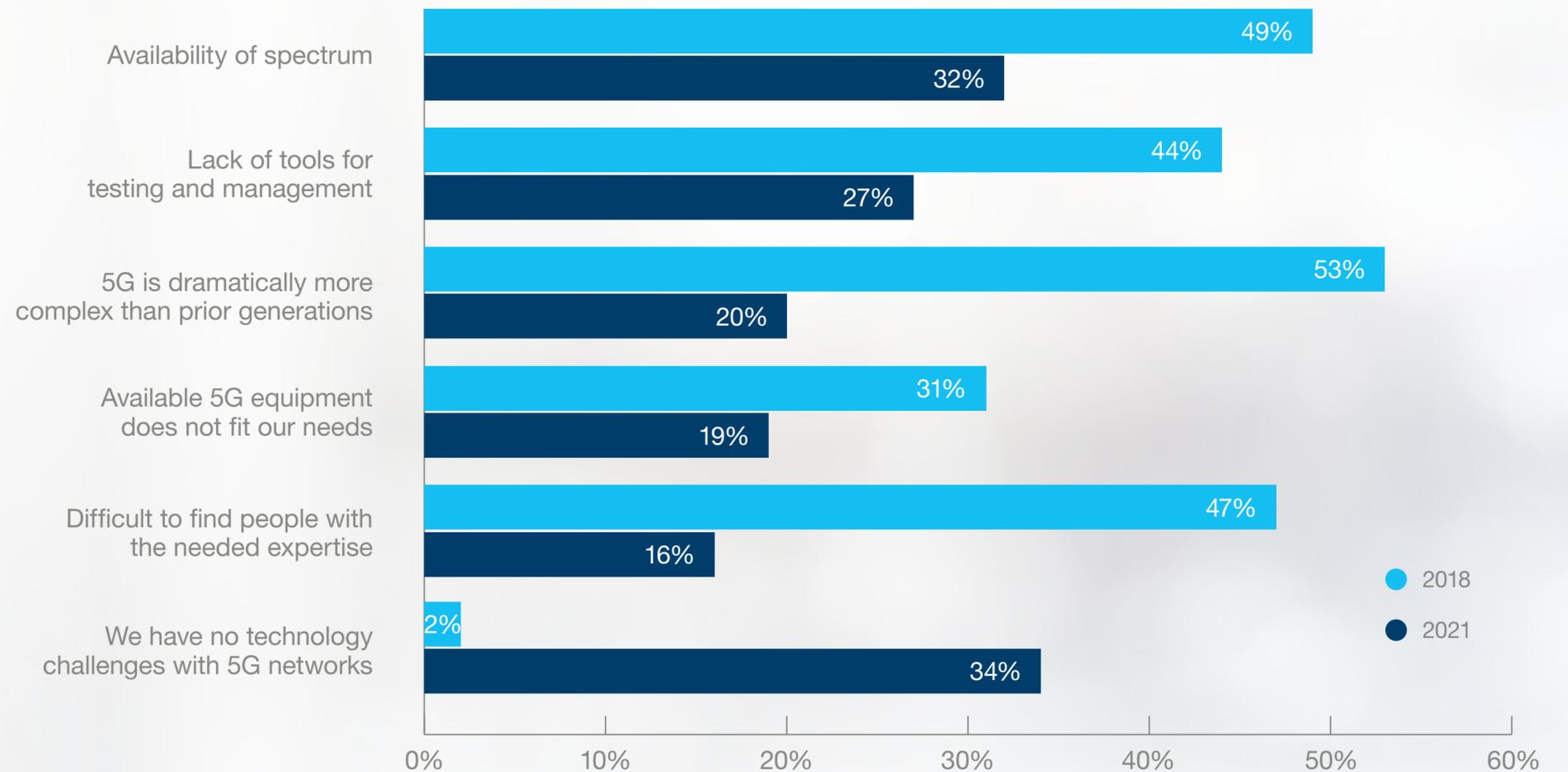


# AVAILABILITY OF SPECTRUM IS BIGGEST 5G TECHNOLOGY CHALLENGE

As companies have gained knowledge and experience with developing and implementing 5G, technology-related challenges have mostly been resolved. The biggest remaining challenge, faced by 32% of our survey respondents, is one that is out of companies' hands — the availability of spectrum. Companies in dozens of countries are working to build out service on spectrum they were awarded in auctions throughout 2021, with more auctions to come in 2022 and beyond in regions like India, Hong Kong, New Zealand, the Netherlands and Sweden.

Before deployment, though, more than a quarter (27%) of respondents said a lack of tools for testing and management presented challenges for their 5G solutions. Overall, 2021 respondents have gained a much firmer grasp of the 5G technology since our last survey; only 20% said 5G's complexity was a challenge, compared with 53% of 2018 respondents.

**Which of the following TECHNOLOGY challenges does your organization face in developing or implementing 5G networks? Choose all that apply.**



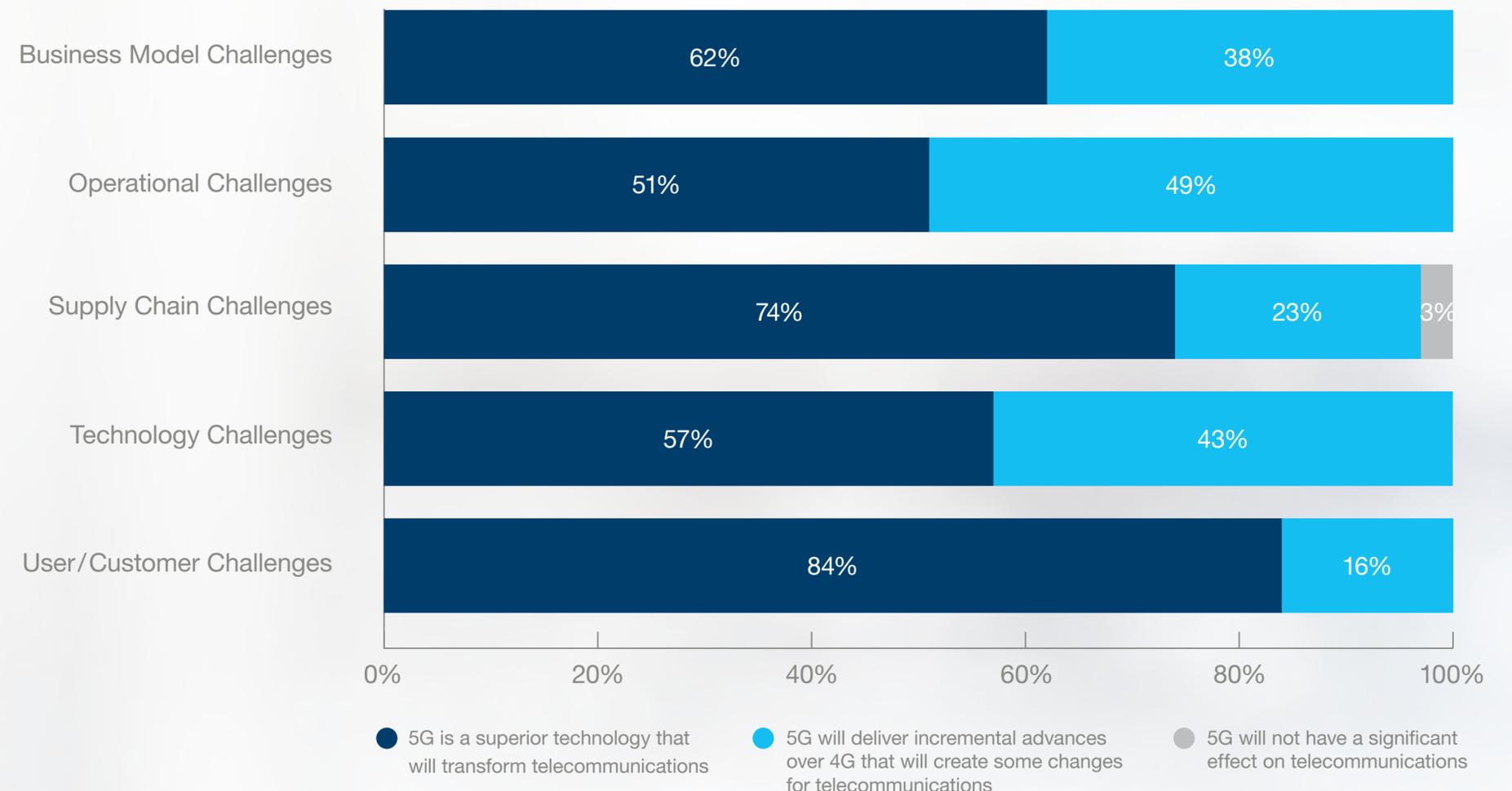
# COMPANIES WITH USER CHALLENGES SEE 5G AS TRANSFORMATIVE, WHILE THOSE WITH OPERATIONAL CHALLENGES ARE SPLIT

Respondents who reported that user or customer challenges are currently their biggest hurdle in developing or implementing 5G overwhelmingly (84%) said they expect 5G will be a superior technology that will transform telecommunications.

However, those facing operational challenges — like networking mapping and developing back-end infrastructure — are almost evenly split between the expectation that 5G will be transformative (51%) and that 5G will deliver incremental advances over 4G (49%).

It is possible that the respondents reporting operational challenges have had more hands-on experiences with 5G to this point than those reporting user challenges, influencing their expectations for their technology going forward.

**Which of the following statements most closely represents your expectations/experiences for 5G?  
By most difficult 5G challenge**





**OPEN RAN  
PRESENTS NEW  
OPPORTUNITIES &  
CHALLENGES**

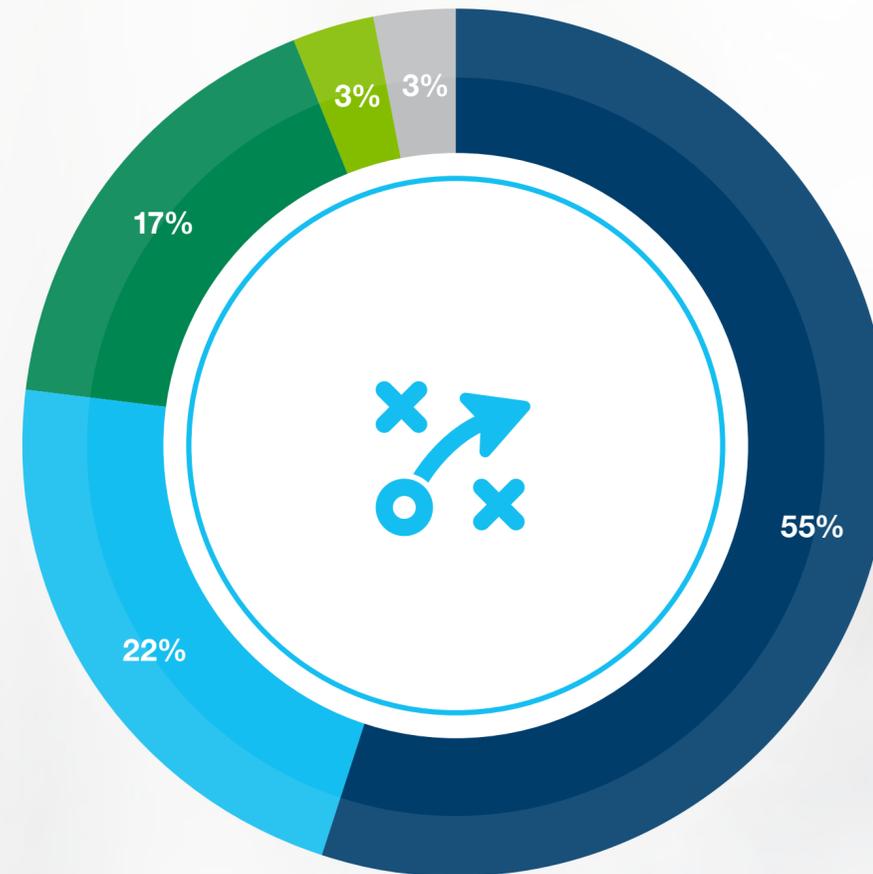


# THE MAJORITY OF COMPANIES ARE SERIOUSLY CONSIDERING AN OPEN RAN STRATEGY

Interest and adoption of Open RAN has grown alongside 5G over the past few years. Groups like the O-RAN Alliance, founded in 2018 by some of the world's largest telecommunications companies, are working to bring network operators, vendors and researchers together to improve and extend Open RAN standards and software, which will ultimately improve the user experience of 5G.

As such, 55% of survey respondents are seriously considering an Open RAN strategy, and 22% already have a strategy in place. Another 17% are thinking about a strategy for their organization.

## Do you currently have an Open RAN strategy? If so, what stage?



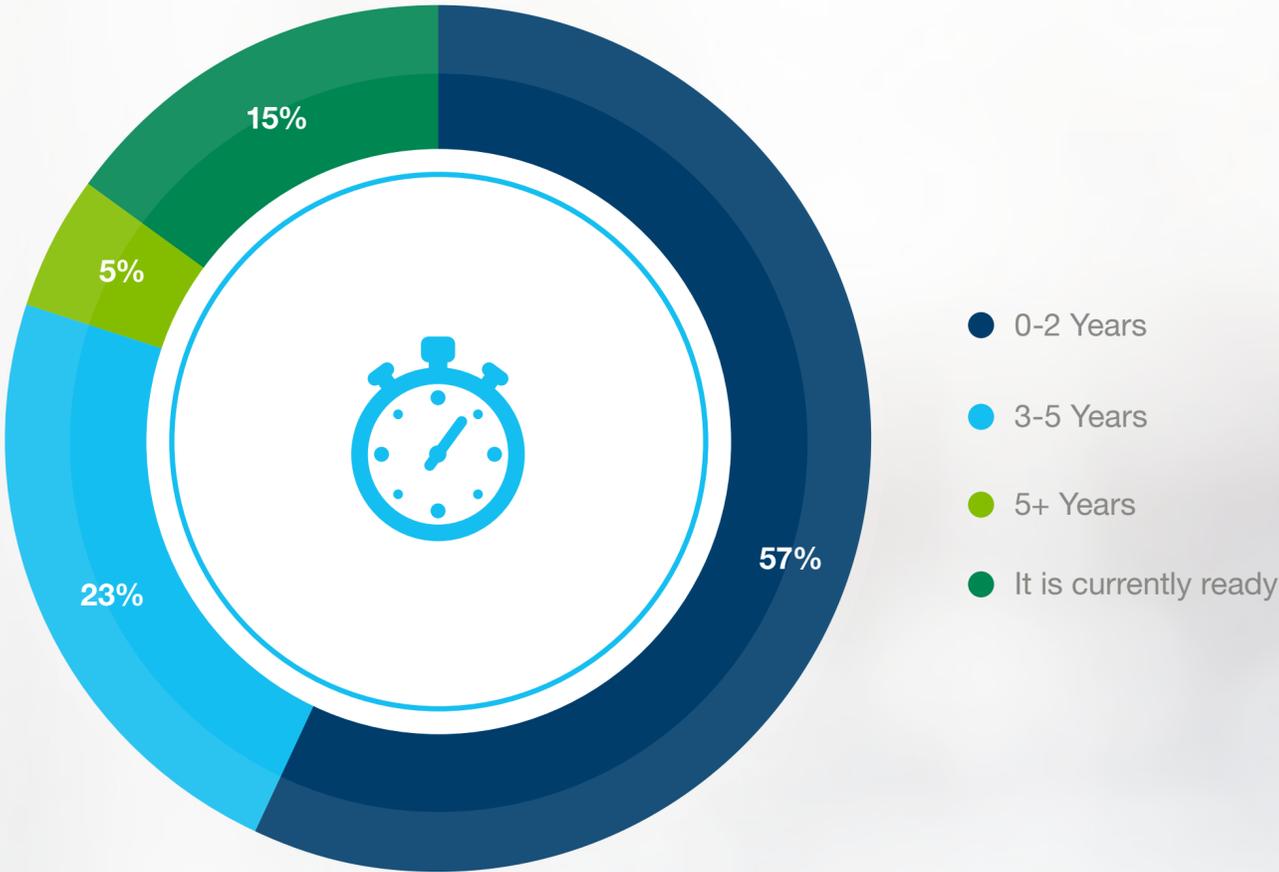
- We have a strategy
- We are seriously considering a strategy
- We are thinking about a strategy but not in a serious way
- We have considered options and decided not to do this in the foreseeable future
- There is no fit for Open RAN strategy for our solutions

# MOST BELIEVE OPEN RAN WILL BE READY IN THE NEXT TWO YEARS

Most companies (57%) believe Open RAN will be ready for widespread deployment alongside 5G in the next two years.

Nearly a quarter (23%) believe it could take as long as three to five years, but very few (5%) expect it will take longer. Some think it could be much sooner. According to 15% of respondents, Open RAN is already available for rollout to the market.

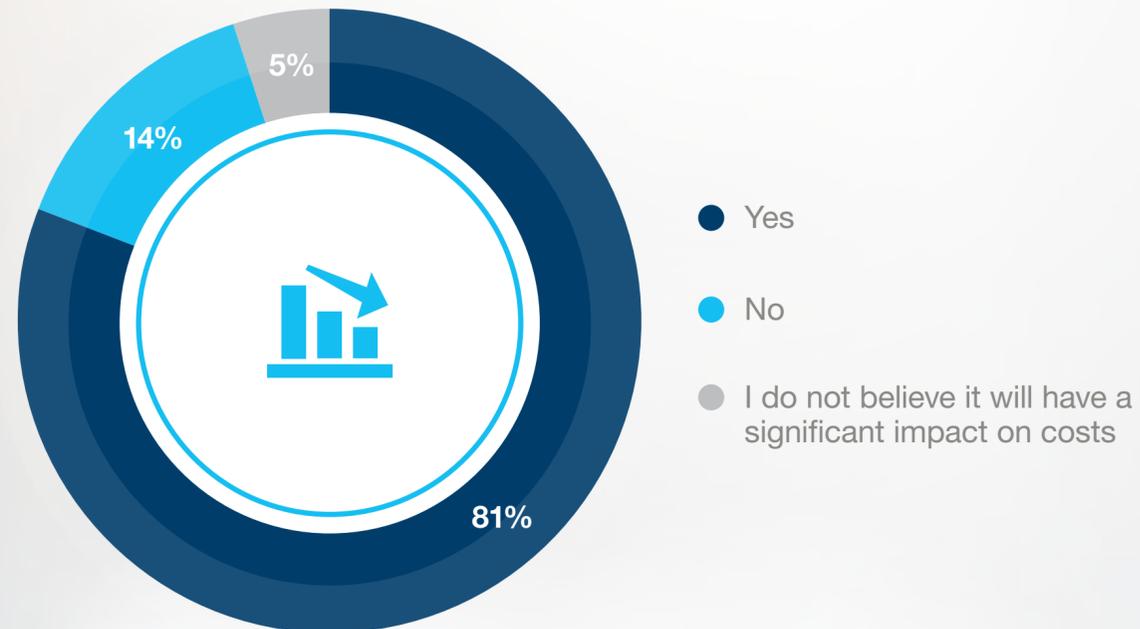
How long will it be until Open RAN is ready to be deployed?



# COMPANIES THAT HAVE OR ARE CONSIDERING OPEN RAN BELIEVE IT WILL REDUCE CAPEX

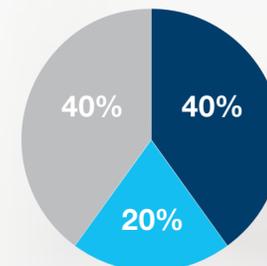
Across the board, survey respondents believe adopting Open RAN networks will reduce capital expenditures, or CAPEX, with 81% agreeing it will bring down costs. Companies who have or are seriously considering adopting the technology were much more likely to believe it will reduce CAPEX. A full 100% of respondents who already have an Open RAN strategy believe it will reduce CAPEX, while 91% who are seriously considering a strategy believe the same.

## Will the adoption of Open RAN reduce CAPEX?

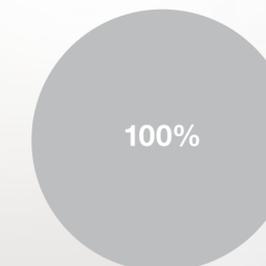


## Will the adoption of Open RAN reduce CAPEX? By current Open RAN strategy

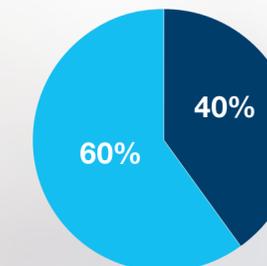
There is no fit for Open RAN strategy for our solutions



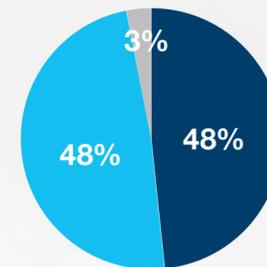
We have not even thought about it



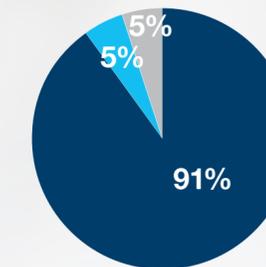
We have considered options and decided not to do this in the foreseeable future



We are thinking about a strategy but not in a serious way



We are seriously considering a strategy



We have a strategy

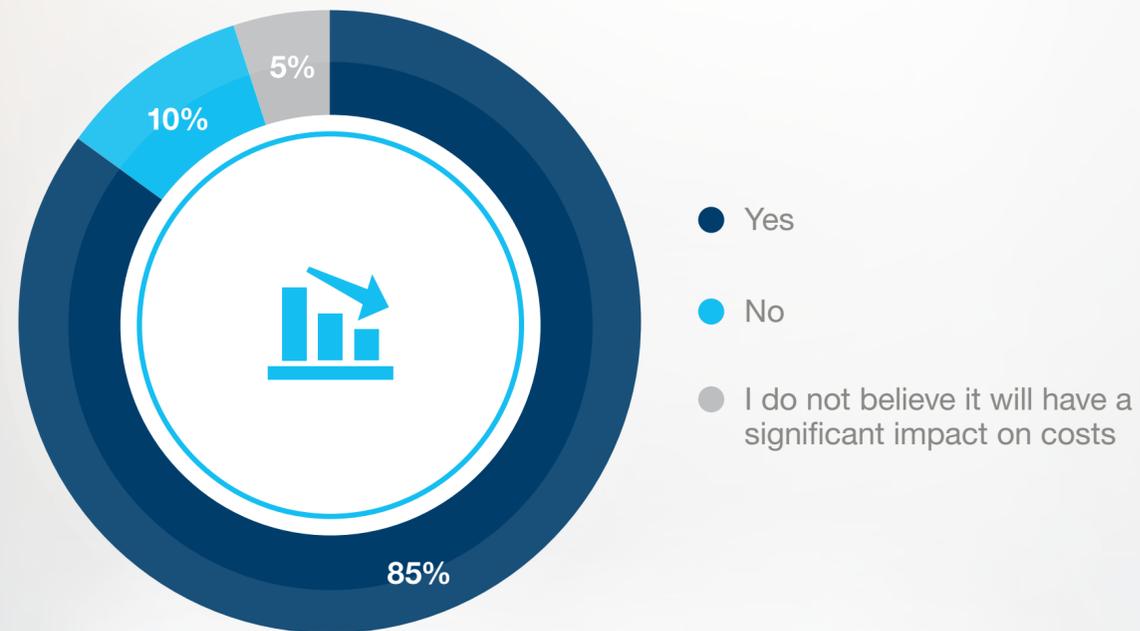


● Yes ● No ● I do not believe it will have a significant impact on costs

# COMPANIES ADOPTING OPEN RAN BELIEVE IT WILL REDUCE OPEX

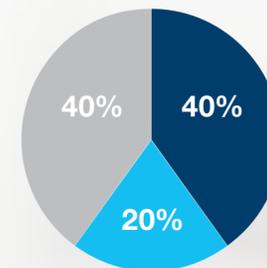
Like capital expenditures, respondents largely believe the adoption of Open RAN will reduce operational expenditures (OPEX), with 85% in agreement. Again, those with a strategy already in place (100%) or under serious consideration (93%) believe most strongly in the potential for Open RAN to help reduce a business's day-to-day costs. Possibly because of the cost-benefit analysis, 80% of companies who have considered Open RAN but decided not to adopt it for the foreseeable future said they don't believe it will reduce OPEX.

## Will the adoption of Open RAN reduce OPEX?



## Will the adoption of Open RAN reduce OPEX? *By current Open RAN strategy*

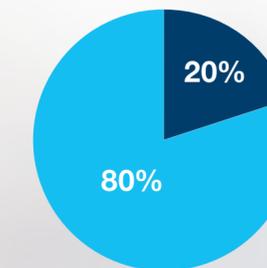
There is no fit for Open RAN strategy for our solutions



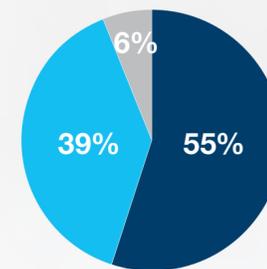
We have not even thought about it



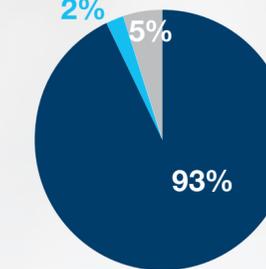
We have considered options and decided not to do this in the foreseeable future



We are thinking about a strategy but not in a serious way



We are seriously considering a strategy



We have a strategy



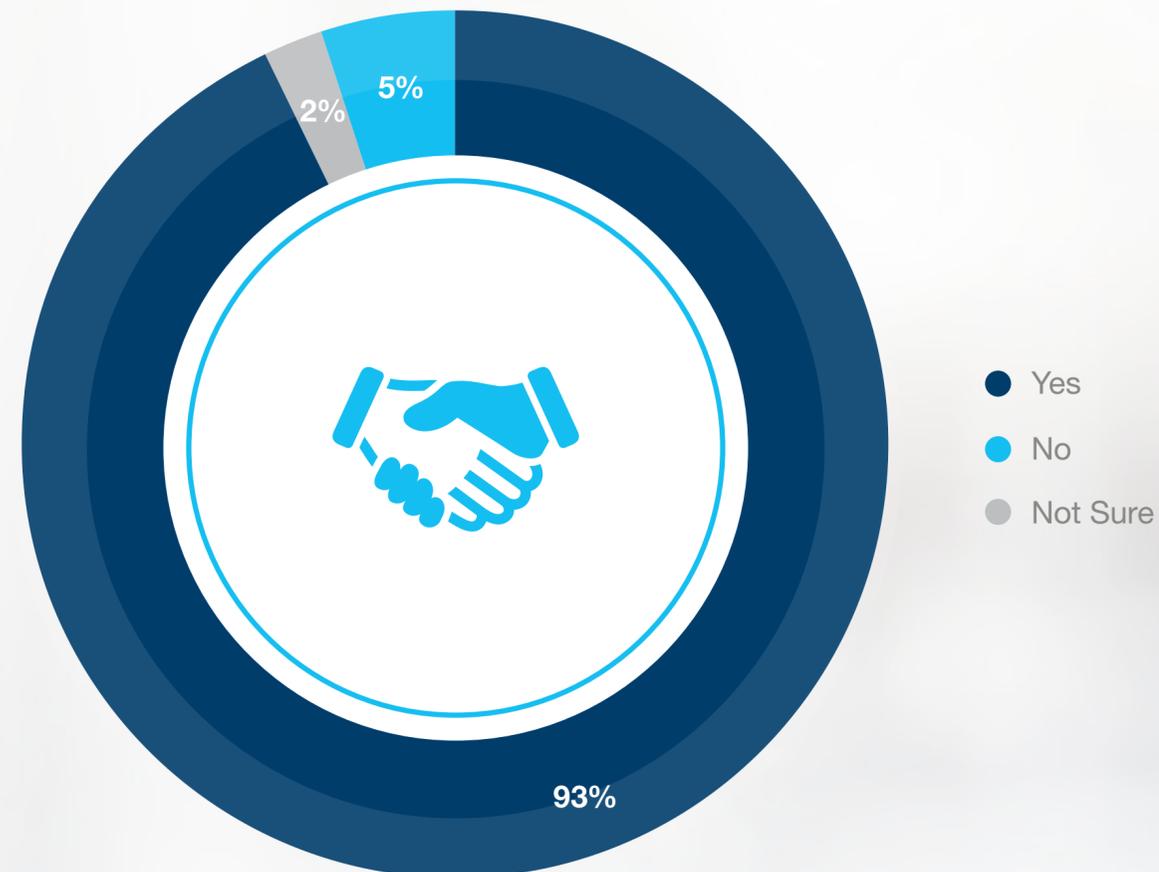
● Yes ● No ● I do not believe it will have a significant impact on costs

# NEARLY ALL BELIEVE THAT 5G WILL FOSTER PARTNERSHIPS BETWEEN SERVICE PROVIDERS AND WEB SERVICE COMPANIES

The 5G ecosystem has allowed web service companies like Amazon, Google and Microsoft to leverage technologies like Open RAN to host their own virtual networks and build associated software.

Overwhelmingly, 93% of our survey respondents believe 5G will foster partnerships between these businesses and traditional telecommunications service providers.

**Do you believe 5G will foster partnerships between service providers and software/web services companies? (Verizon/AWS working together, AT&T and Azure, etc.)**



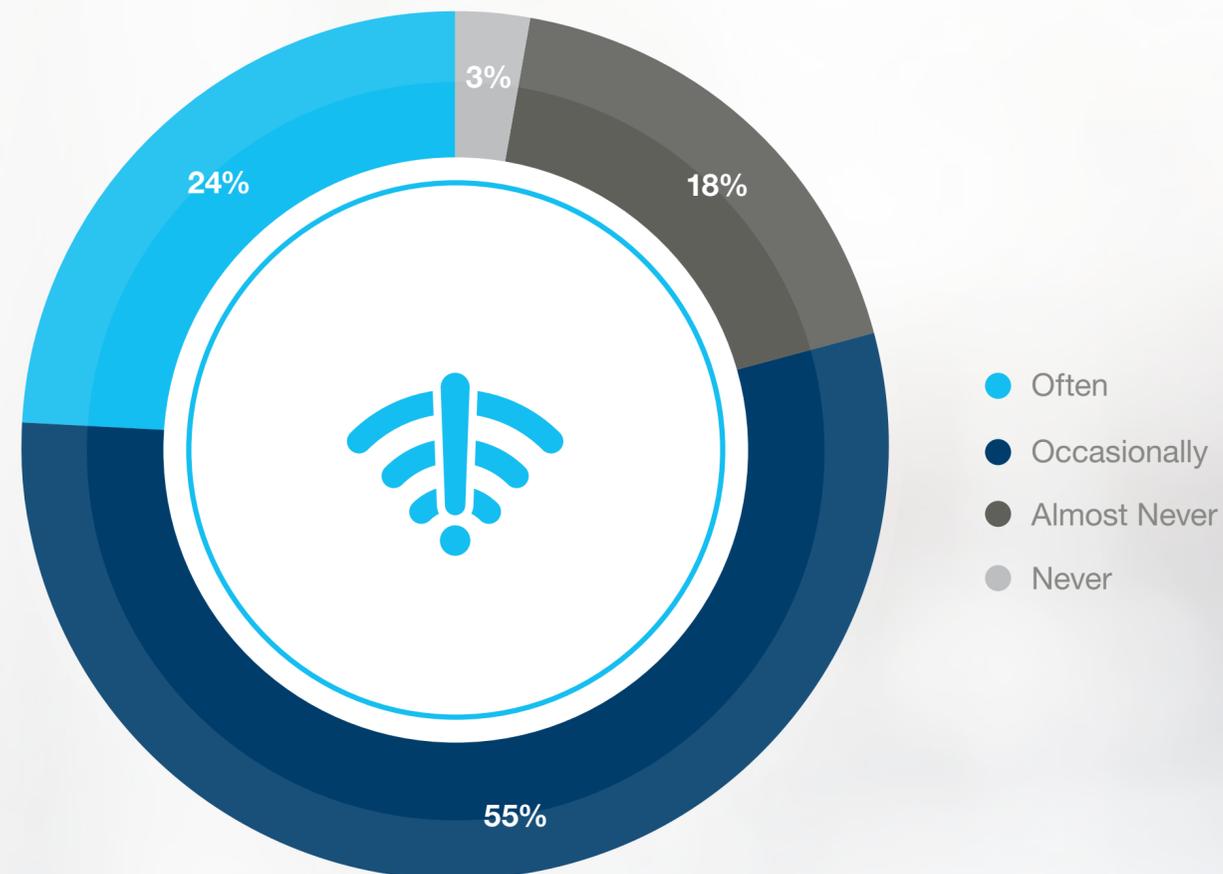
# TELCOS EXPECT NETWORK PERFORMANCE VARIABILITY WHEN ROLLING OUT OPEN RAN

All new technologies take a learning curve. 5G and all its associated elements are certainly not exceptions — especially Open RAN. This new open network would allow new companies and developers to build on 5G spectrum using a set of industry-standard specifications.

As such, 79% of survey respondents expect some degree of variability in the performance of a new Open RAN network — dropped calls, poor call quality, throughput issues — when it is first rolled out.

More than half (55%) think this variability will happen occasionally, while 24% expect it often. However, 18% of respondents expect these issues will “almost never” happen.

**Do you expect variability in network performance (call quality, call drops, throughput) when first rolling out an Open RAN network? If so, how much?**

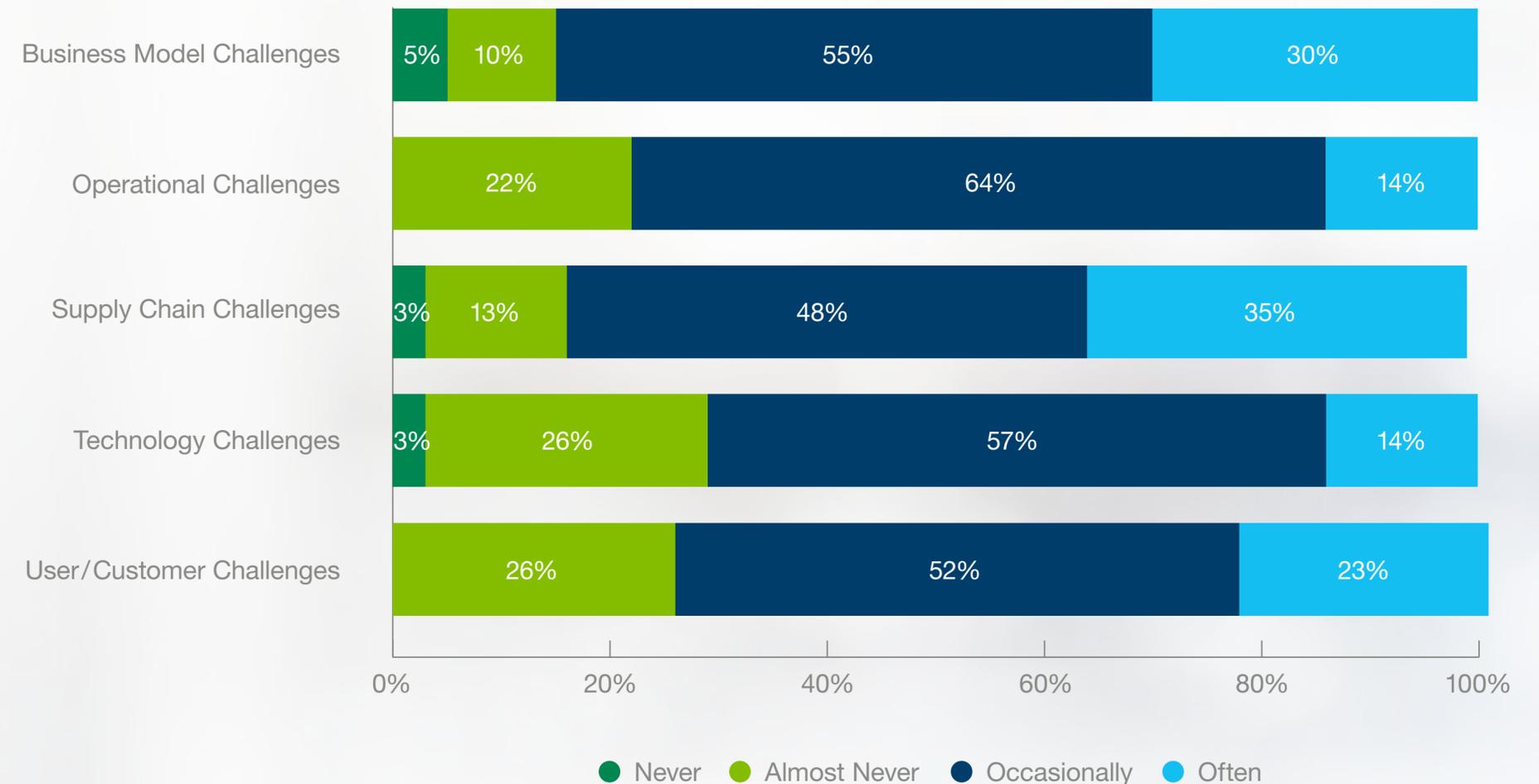


# COMPANIES WITH BUSINESS MODEL AND SUPPLY CHAIN CHALLENGES EXPECT THE MOST VARIABILITY WITH OPEN RAN

Respondents that reported supply chain and business model challenges expect to see the most frequent variability in network performance due to Open RAN deployment.

More than a third with supply chain challenges (35%) said they expect to see variability “often,” while 48% expect it “occasionally.” Companies facing business model challenges also expect to see network variability issues, with 30% predicting they would occur “often” and 55% believing they would happen “occasionally.”

**Do you expect variability in network performance (call quality, call drops, throughput) when first rolling out an Open RAN network? If so, how much? By most difficult 5G challenge**

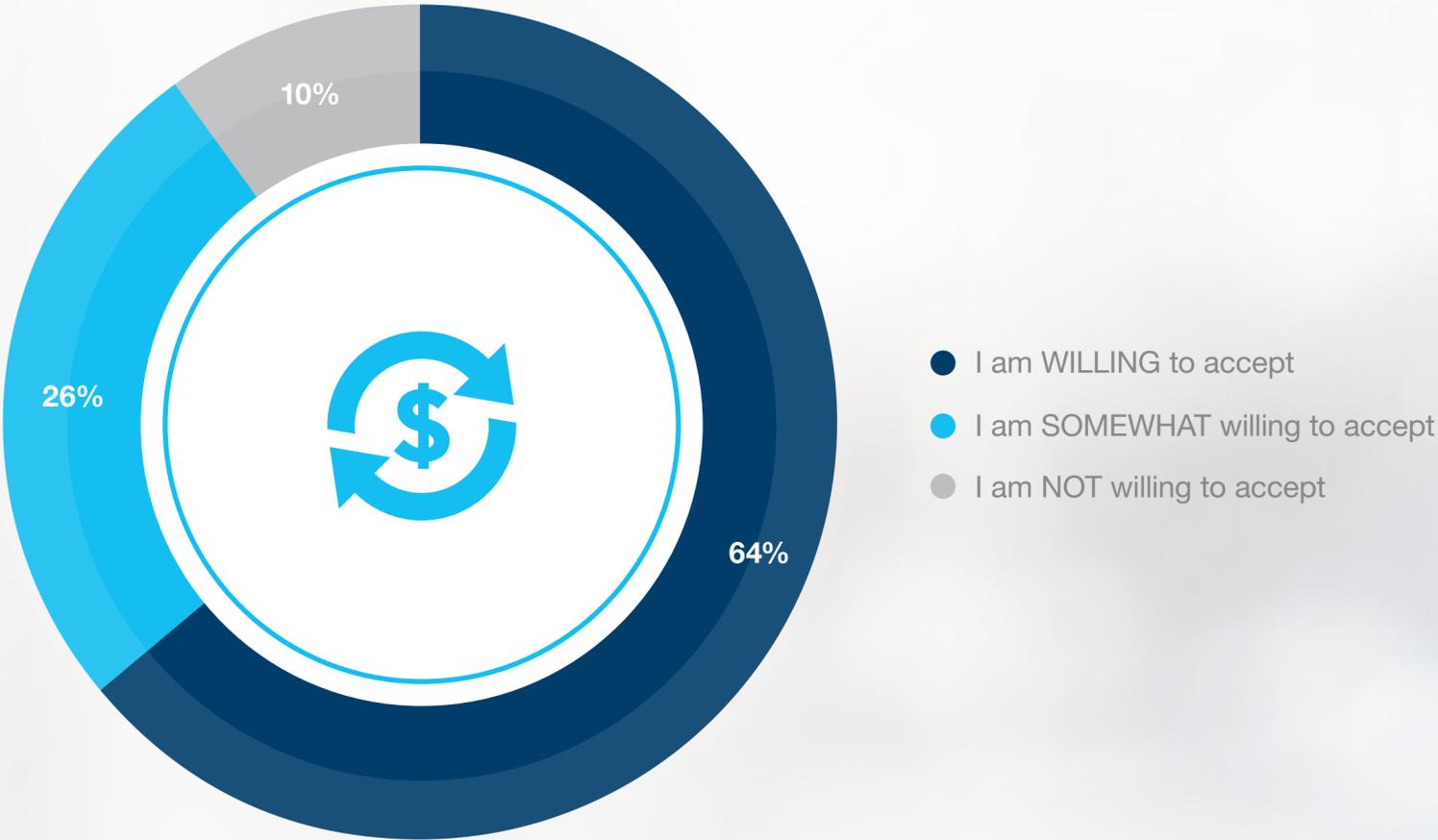


# MOST COMPANIES WILLING TO ACCEPT HIGHER INCIDENCE RATE FOR OPEN RAN BENEFITS

Nearly two thirds (64%) of respondents said they would be willing to accept a higher rate of dropped calls or poor call quality for the financial and operational benefits of Open RAN. **“By significantly increasing efficiency, accepting a higher incidence rate will be acceptable,”** one respondent said, while another added, **“We transmit a lot of data and less voice, so some incidents will not likely affect service.”**

More than a quarter (26%) said they would be somewhat willing to accept a higher incidence rate, with one respondent pointing out that these challenges could be temporary. **“All improved technologies have burn-in,”** the respondent said. **“It is better to adopt early and handle some hiccups.”** However, 10% were not at all willing to accept lesser quality for financial or operational benefits. **“Quality of Experience (QoE) for its customer shall be paramount for any service provider to adopt technologies and shall determine the overall productivity and growth,”** one respondent said.

## Would you be willing to accept a higher incidence rate in exchange for the financial and operational benefits of Open RAN?



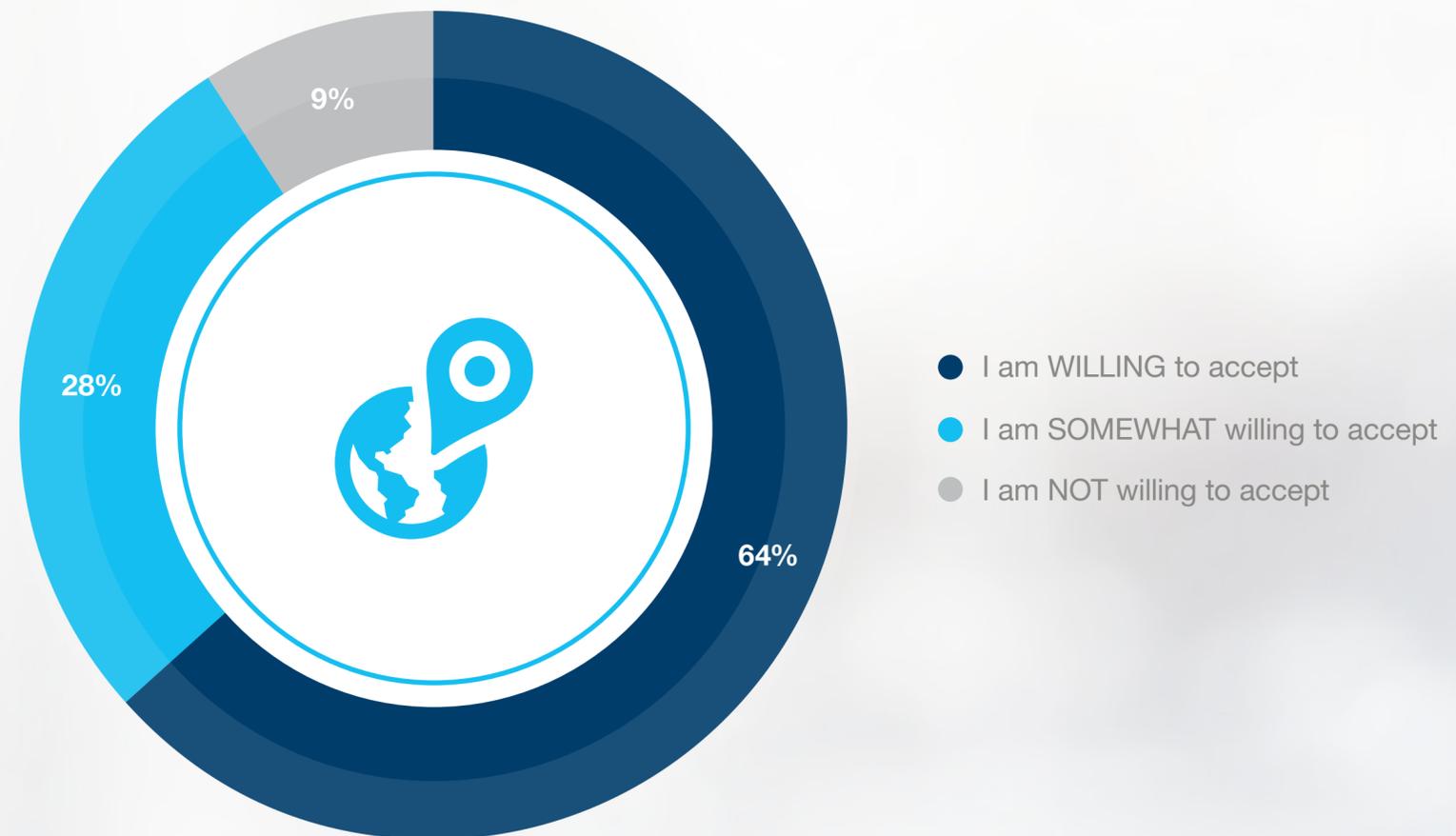
# ROUGHLY TWO-THIRDS WILLING TO ACCEPT PERFORMANCE VARIATION FOR MORE SUPPLIERS

The majority of companies (64%) said they would be willing to accept network performance variation balance against an increased selection of suppliers, which Open RAN can make possible. One respondent said, **“Yes – why not, since network performance will be improved?”**

Another pointed out that the networks will be vetted before going live. **“Interoperability of disaggregated 5G access infrastructure elements can be fully validated prior to network deployment,”** the respondent said.

Still, some respondents said performance variation could work against the progress companies intend to make with 5G. **“Variation in network, will be counterproductive in this era of 5G technology and for the economic potential associated with it,”** said one. Another said that, with Open RAN creating a more level playing field, **“This will be how things will become – everyone [will be] a supplier.”**

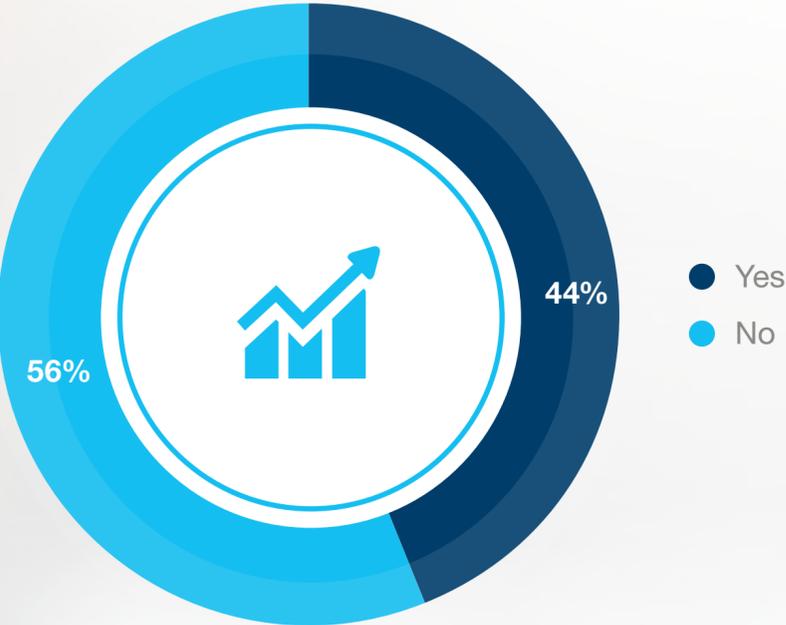
## Would you be willing to accept network performance variation balanced against more supplier selection?



# PROVIDERS ARE UNCERTAIN ABOUT THE ROLE OF HYPERSCALERS IN OPEN RAN STRATEGIES

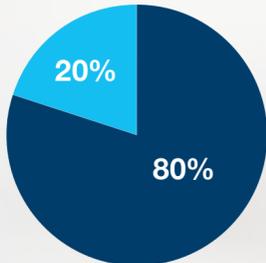
Companies are somewhat split on whether hyperscalers that are building their own networks and software — like Amazon Web Services, Google and Alibaba — fit into their overall Open RAN strategy, with 44% believing they have a place and 56% believing they don't. Two thirds of respondents (67%) that have Open RAN strategies in place already said hyperscalers fit into their roadmap, while just under half (48%) of companies seriously considering an Open RAN strategy said the same.

**Do hyperscalers (Amazon, Microsoft, Alibaba, Google, etc.) fit into your Open RAN strategy?**



**Do hyperscalers (Amazon, Microsoft, Alibaba, Google, etc.) fit into your Open RAN strategy? By Open-RAN strategy**

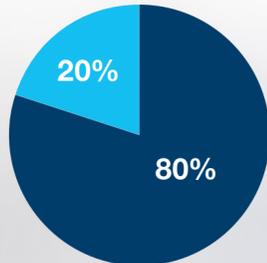
There is no fit for Open RAN strategy for our solutions



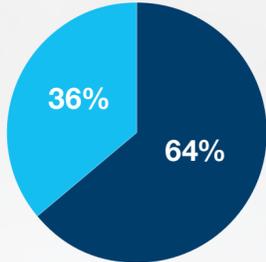
We have not even thought about it



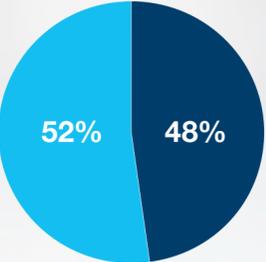
We have considered options and decided not to do this in the foreseeable future



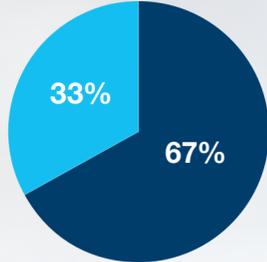
We are thinking about a strategy but not in a serious way



We are seriously considering a strategy



We have a strategy



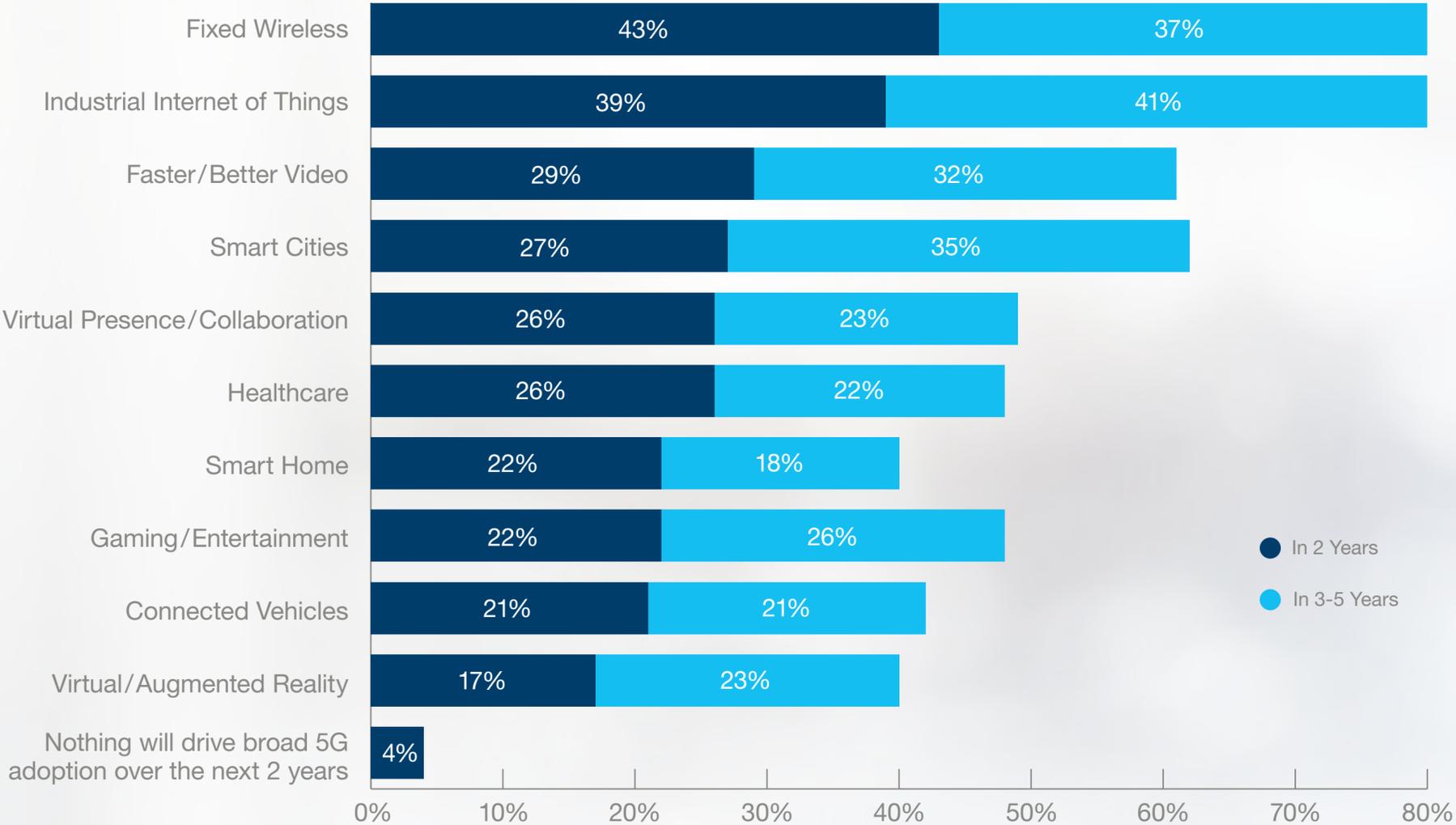
● Yes ● No

# FIXED WIRELESS AND INDUSTRIAL IoT WILL DRIVE 5G ADOPTION

Our survey respondents believe fixed wireless (like “5G boxes” that customers or businesses can use to support or instead of WiFi) and the industrial internet of things will drive 5G adoption in the immediate term and continue fueling it over the next three to five years.

In that next wave of 5G adoption, they expect demands for smart cities and improved video to push the technology mainstream. Though virtual and augmented reality has been an often-named potential use case for 5G, only 17% of respondents believe it will drive widespread 5G adoption in the next two years, and just 23% believe it will do so over the next three to five years.

**What specific user needs or use cases do you expect to drive broad 5G adoption?**



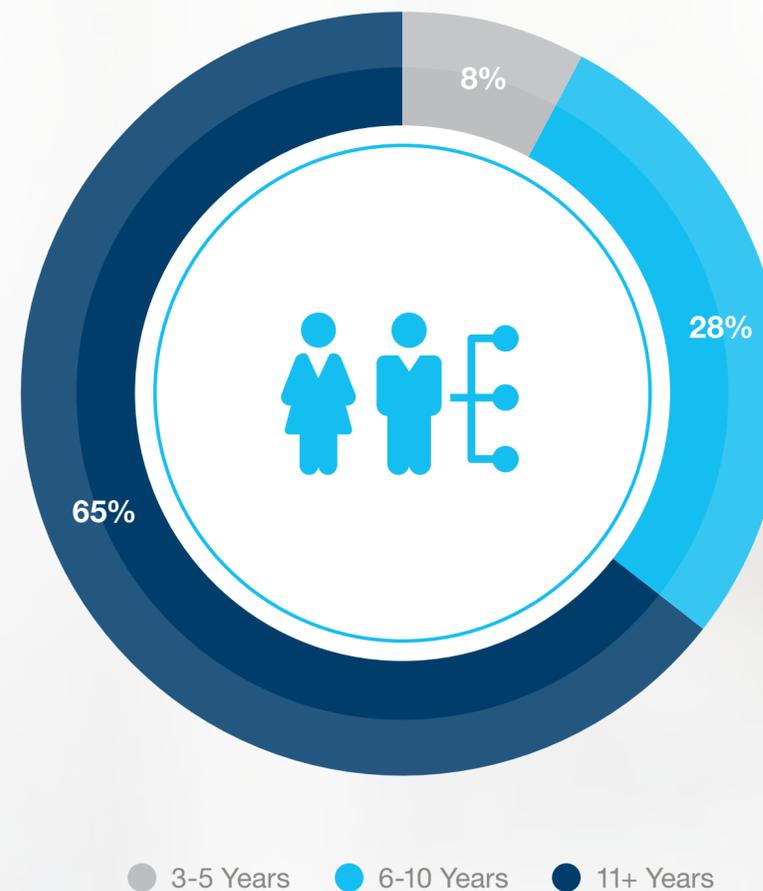
# SURVEY METHOD AND PARTICIPANTS

An online survey was fielded between October 2021 and January 2022 to telecommunications decision-makers responsible for development, implementation or adoption of 5G technologies.

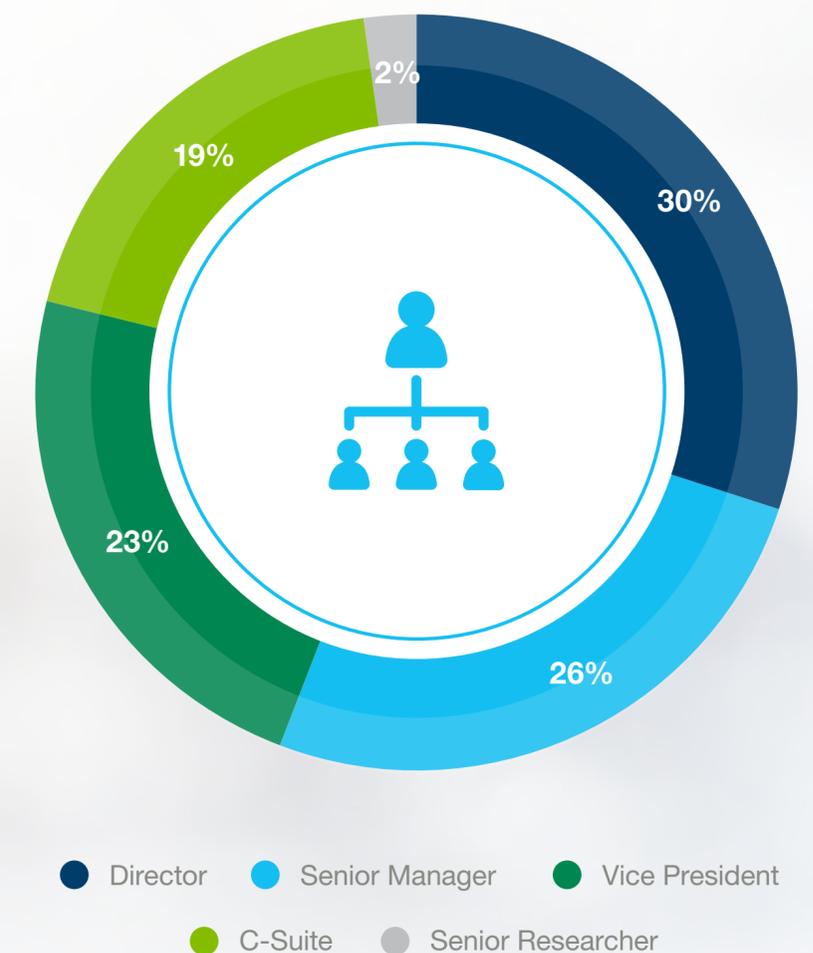
A range of questions were asked, including predictions, opportunities and challenges associated with 5G. A total of 193 individuals completed the survey.

The majority of participants were from North America (the U.S. and Canada), with additional respondents from Europe, the Middle East and Asia-Pacific.

### How many years have you been in telecommunications?



### What is your level of seniority?



# ABOUT JABIL TELECOMMUNICATIONS

We are in an era of unprecedented innovation in the telecommunications industry, driven by the demand of voice, data and video users for ubiquitous high-speed connectivity. The rate of technology advancement is intersecting with a pull from the global marketplace, creating pressure across the communications ecosystem to dramatically reduce development cycle times and price points. 5G is at the center of this. Winning in this dynamic landscape requires equipment vendors and service providers to leverage trusted partners who are committed to increasing speed and eliminating waste throughout the product realization process.

## Why Jabil?

For more than two decades, Jabil has been providing our partners in the telecommunications industry with uncompromising service that enables cost effective scaling and consistently delivers best in class execution.

Leveraging highly integrated solutions, Jabil industrializes customer innovations to meet rigorous performance standards around total cost, quality, reliability, and delivery. Our customized engagement models and comprehensive strategic capabilities offer Jabil customers a competitive advantage in a rapidly evolving market.

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