



# Telecoms services for enterprises: Indonesia forecast 2018–2023



Igor Babić

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## About this report

This report analyses the demand for telecoms services by micro, small and medium-sized enterprises (MSMEs) and large enterprises, expressed in terms of revenue, the number of connections or users and average revenue per user (ARPU).<sup>1</sup>

The report highlights that operator enterprise revenue in Indonesia will grow between 2018 and 2023 and identifies the key drivers behind this trend.

It quantifies the market for fixed and mobile voice and data services, IoT connectivity services and other business services such as security, co-location and hosting, enterprise mobility and software-as-a-service (SaaS).

The report is based on several sources, including data from operators, the Indonesian Telecommunication Regulatory Authority, Statistics Indonesia and Analysys Mason's 2017 survey on enterprises' telecoms and ICT usage.

### WHO SHOULD READ THIS REPORT

- Operators that want to identify key areas for revenue growth, both in terms of enterprise segments and individual services.
- Vendors that are considering targeting the enterprise market.
- Third-party service providers seeking collaborative relations with operators.

### REPORT COVERAGE

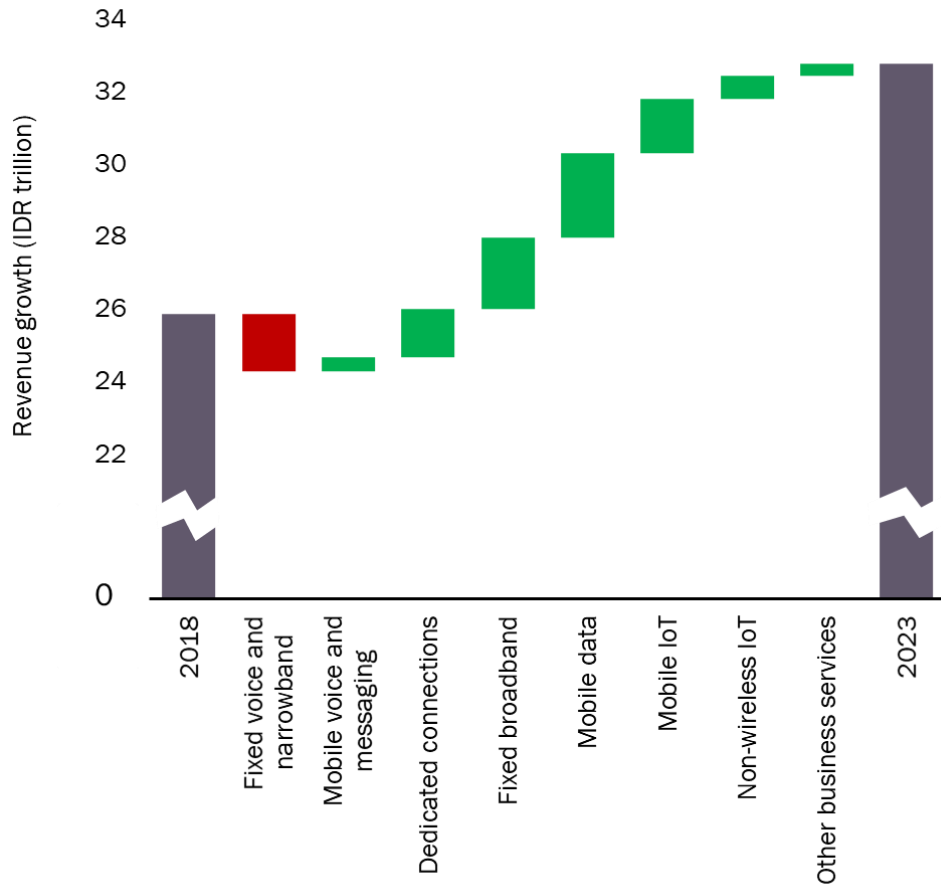
Geographical	Services <sup>2</sup>	
<b>Countries modelled individually:</b> <ul style="list-style-type: none"> <li>▪ Indonesia</li> </ul>	<b>Mobile:</b> <ul style="list-style-type: none"> <li>▪ Voice, messaging and handset data</li> <li>▪ Mobile broadband</li> <li>▪ IoT connectivity (mobile and LPWA)</li> </ul> <b>Fixed:</b> <ul style="list-style-type: none"> <li>▪ Narrowband and VoBB</li> <li>▪ ADSL/SDSL, vDSL, FTTP/B, cable, BFWA, other fixed broadband</li> <li>▪ Dedicated connections up to 100Mbps, &gt;100Mbps and up to 1Gbps, and &gt;1Gbps</li> <li>▪ Traditional managed services</li> <li>▪ IoT connectivity</li> </ul>	<b>Other business services:</b> <ul style="list-style-type: none"> <li>▪ Unified communications</li> <li>▪ Security</li> <li>▪ Co-location and hosting</li> <li>▪ Private cloud</li> <li>▪ Software-as-a-service (SaaS, public cloud)</li> <li>▪ Platform-as-a-service (PaaS, public cloud)</li> <li>▪ Infrastructure-as-a-service (IaaS, public cloud)</li> <li>▪ Enterprise mobility</li> <li>▪ Desktop management</li> </ul>
<b>Enterprise size</b>		
<b>Segments:</b> <ul style="list-style-type: none"> <li>▪ Micro (0–9 employees)</li> <li>▪ Small (10–49 employees)</li> <li>▪ Medium (50–249 employees)</li> <li>▪ Large (250+ employees)</li> </ul>		

<sup>1</sup> For the complete data set, see Analysys Mason's [DataHub](#).

<sup>2</sup> See service taxonomy in the 'Forecast methodology and assumptions' section of this report.

# Executive summary: operator enterprise revenue will grow, mainly driven by revenue increases in mobile data, fixed broadband and IoT connectivity

Figure 1: Change in telecoms operator retail revenue from enterprises by service type, Indonesia, 2018–2023<sup>1,2</sup>



Source: Analysys Mason

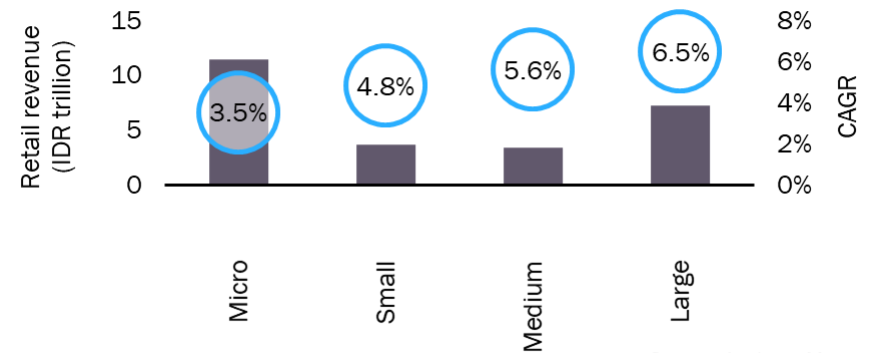
<sup>1</sup> Red denotes a decrease, and green an increase.

<sup>2</sup> See the 'Presentation of results' slide in the 'Forecast methodology and assumptions' section of this report for full definitions of the aggregate categories presented in the figures.

Figure 2: Connections for enterprises and CAGRs by type of connection, Indonesia, 2018–2023<sup>2</sup>

Connection type	Connections (million)		CAGR	
	2018	2023	2014–2018	2018–2023
Mobile handsets	6.6	7.9	13.7%	3.6%
Mobile broadband	0.8	1.2	33.3%	9.5%
Mobile IoT	4.2	35.3	33.3%	53.0%
Fixed voice	1.74	1.70	-19.1%	-0.5%
Fixed broadband	1.9	2.7	17.5%	7.1%
Fixed dedicated lines	0.43	0.46	3.2%	1.5%
Non-wireless IoT	4.3	7.5	10.8%	11.6%

Figure 3: Telecoms operator retail revenue from enterprises in 2018 and CAGR for 2018–2023 by enterprise size, Indonesia<sup>2</sup>



Source: Analysys Mason



Executive summary

Forecast results

Forecast methodology and assumptions

**About the author and Analysys Mason**

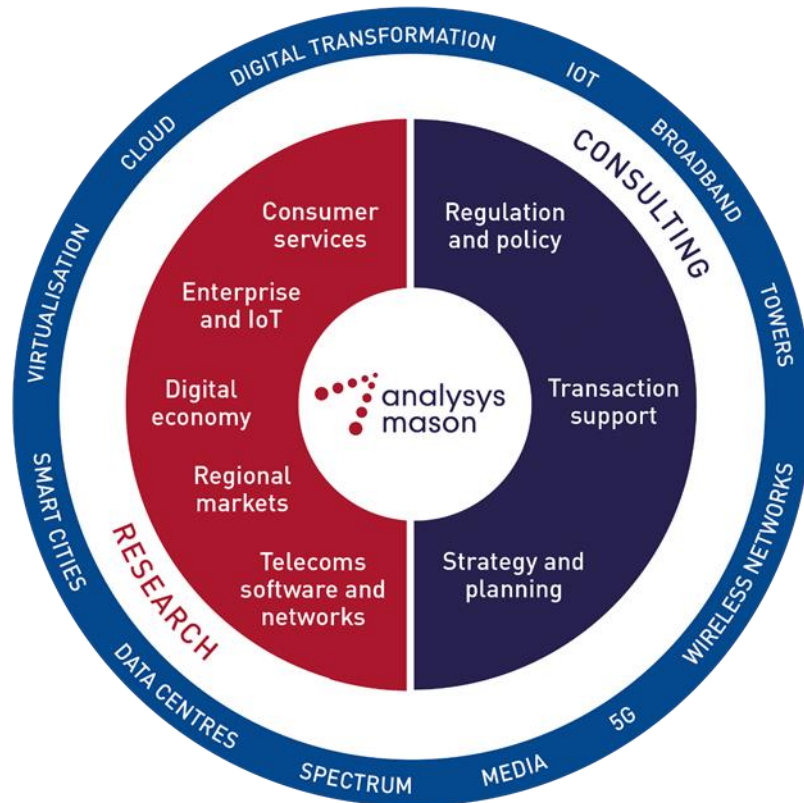
## About the author



**Igor Babić** (Research Analyst) is a member of Analysys Mason's *Enterprise and IoT* research practice and is mainly focusing on market forecasting and enterprise research commentaries. Prior to joining Analysys Mason, he completed a BEng in Engineering Business Management at Warwick and an MPhil in Industrial Systems, Manufacture and Management at Cambridge.

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- European Telecoms Market Matrix
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