



# Operator business services: Japan forecast 2018–2023



Igor Babić

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9. Medium-sized and large businesses will deliver revenue growth; large enterprises will remain the largest source of operators' business revenue

10. Revenue from mobile services will remain relatively stable over the forecast period; IoT connectivity and mobile data revenue growth will result in a slight increase

11. Operator revenue from fixed services in Japan will decrease during the forecast period, driven by a fall in revenue from voice services

12. The number of business fixed data connections in Japan will increase between 2018 and 2023, along with the demand for higher-bandwidth services

13. The addressable market for other business services for operators will continue to grow as businesses migrate further towards cloud-based business solutions

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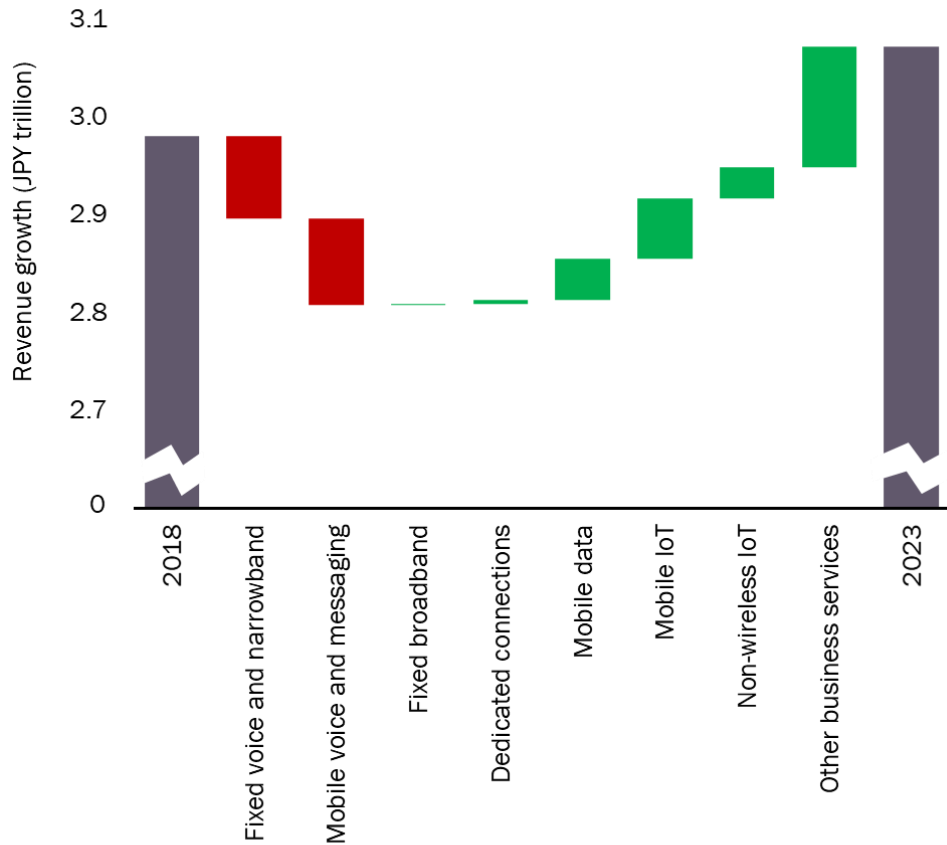
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# Executive summary: operator business revenue in Japan will grow between 2018 and 2023, driven by a growing demand for ICT services and IoT connectivity

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



Source: Analysys Mason

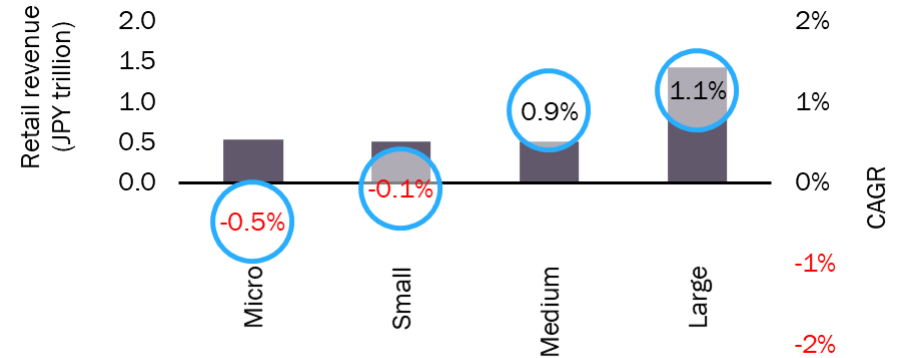
<sup>1</sup> Red denotes a decrease, and green an increase.

<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 businesses and CAGRs by type of connection, Japan, 2018–2023<sup>2</sup>

Connection type	Connections (thousand)		CAGR	
	2018	2023	2014–2018	2018–2023
Mobile handsets	19 310	20 020	5.4%	0.7%
Mobile broadband	2480	2430	-12.9%	-0.4%
Mobile IoT	17 280	116 520	11.1%	46.5%
Fixed voice	19 700	17 280	-1.5%	-2.6%
Fixed broadband	3990	4160	1.7%	0.8%
Fixed dedicated lines	884	892	0.0%	0.2%
Non-wireless IoT	31 320	48 130	31.1%	9.0%

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



Source: Analysys Mason



Executive summary

Forecast results

Forecast methodology and assumptions

**About the author and Analysys Mason**

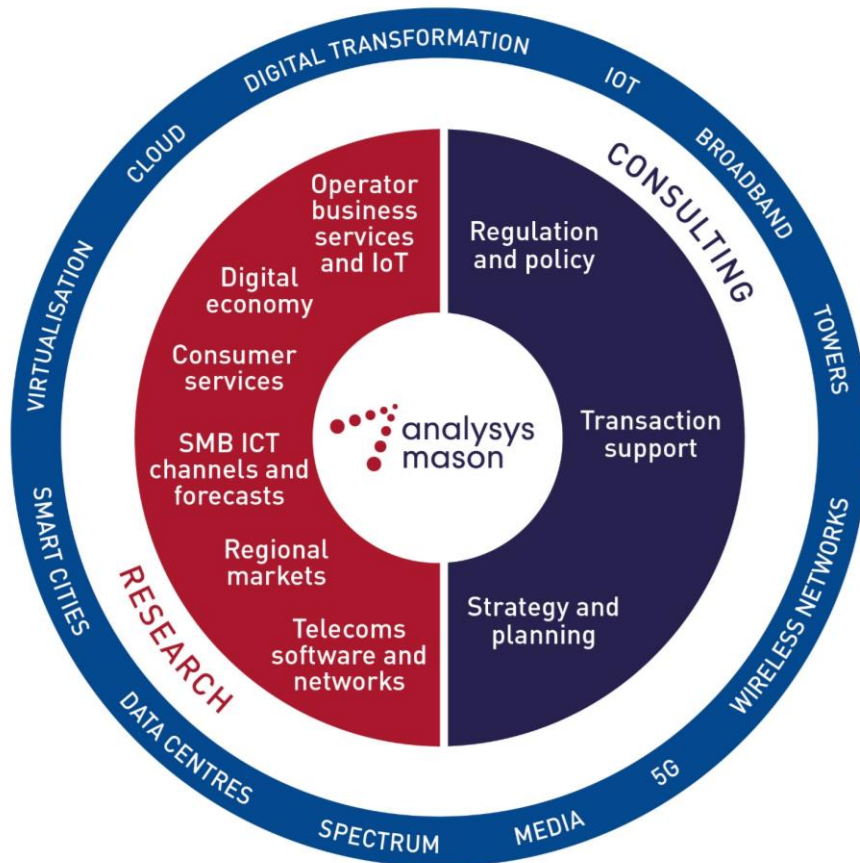
## About the author



**Igor Babić** (Analyst) is a member of Analysys Mason's *Operator business services 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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