



Operator business services: Mexico forecast 2018–2023



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9. Enterprises of all sizes will deliver revenue growth, but most of this growth will come from large enterprises

10. Growth in handset data revenue will lead to an increase in mobile services revenue in Mexico during the forecast period

11. Operator revenue from fixed services in Mexico will decrease slightly during the forecast period, driven by a decline in voice and narrowband revenue

12. The number of fixed data connections in Mexico will increase and FTTP/B will become the most-common fixed broadband connection type by 2023

13. Operators' addressable market for other business services will continue to grow as the take-up of these services by enterprises in Mexico increases

14. The key other business services markets that are addressed by operators in Mexico are security, co-location and hosting and SaaS

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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 the average revenue per user (ARPU).¹

The report highlights that operator business services revenue in Mexico 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, private cloud and software-as-a-service (SaaS).

The report is based on several sources, including data from operators, the Mexican National Institute of Statistics and Geography, the Federal Telecommunications Institute 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

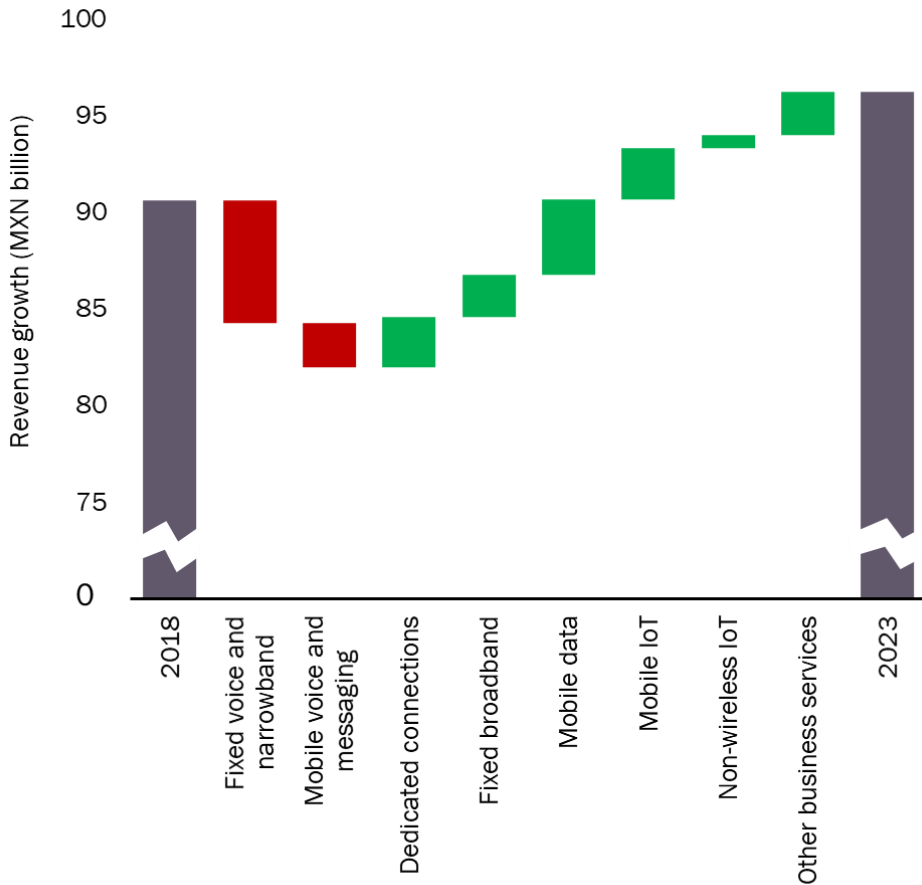
Geographical	Services ²	
Countries modelled individually: <ul style="list-style-type: none"> ▪ Mexico 	Mobile: <ul style="list-style-type: none"> ▪ Voice, messaging and handset data ▪ Mobile broadband ▪ IoT connectivity (mobile and LPWA) 	Other business services: <ul style="list-style-type: none"> ▪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

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

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

Executive summary: increases in revenue from mobile and fixed data services will drive operator enterprise revenue growth between 2018 and 2023

Figure 1: Change in telecoms operator retail revenue from enterprises by service type, Mexico, 2018–2023^{1,2}



Source: Analysys Mason

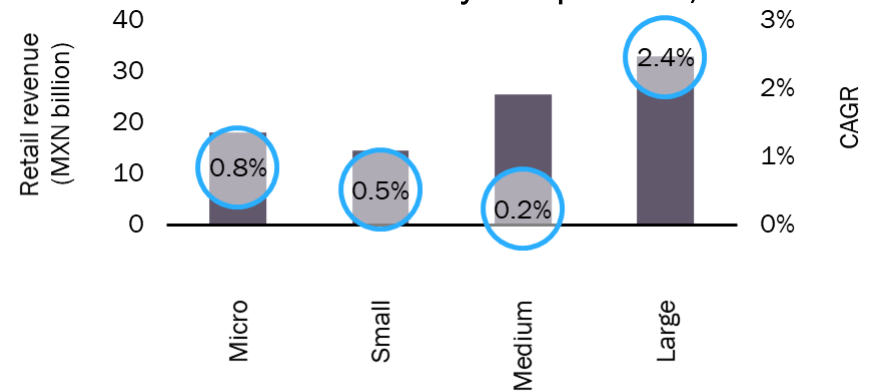
¹ Red denotes a decrease, and green an increase.

² 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, Mexico, 2018–2023²

Connection type	Connections (thousand)		CAGR	
	2018	2023	2014–2018	2018–2023
Mobile handsets	6370	7620	2.6%	3.6%
Mobile broadband	417	372	-1.8%	-2.3%
Mobile IoT	5320	28 930	40.4%	40.3%
Fixed voice	5710	5710	1.2%	0%
Fixed broadband	2477	2978	12.2%	3.8%
Fixed dedicated lines	102	112	3.2%	1.9%
Non-wireless IoT	6440	12 010	19.6%	13.3%

Figure 3: Telecoms operator retail revenue from enterprises in 2018 and CAGR for 2018–2023 by enterprise size, Mexico²



Source: Analysys Mason

About the authors



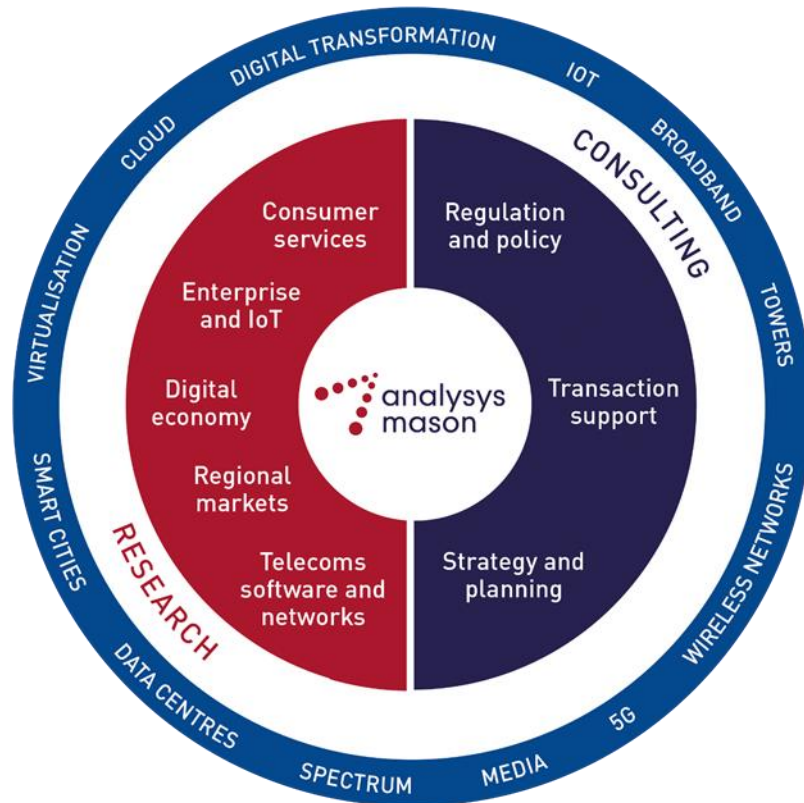
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