RESEARCH

Operator business services: Mexico forecast 2018–2023

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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

Countries modelled individually:

- Mexico

Enterprise size

Segments:

- Micro (0–9 employees)
- Small (10–49 employees)
- Medium (50–249 employees)
- Large (250+ employees)

Services[2]

Mobile:

- Voice, messaging and handset data
- Mobile broadband
- IoT connectivity (mobile and LPWA)

Fixed:

- Narrowband and VoBB
- ADSL/SDSL, vDSL, FTTP/B, cable, BFWA, other fixed broadband
- Dedicated connections up to 100Mbps, >100Mbps and up to 1Gbps, and >1Gbps
- Traditional managed services
- IoT connectivity

Other business services:

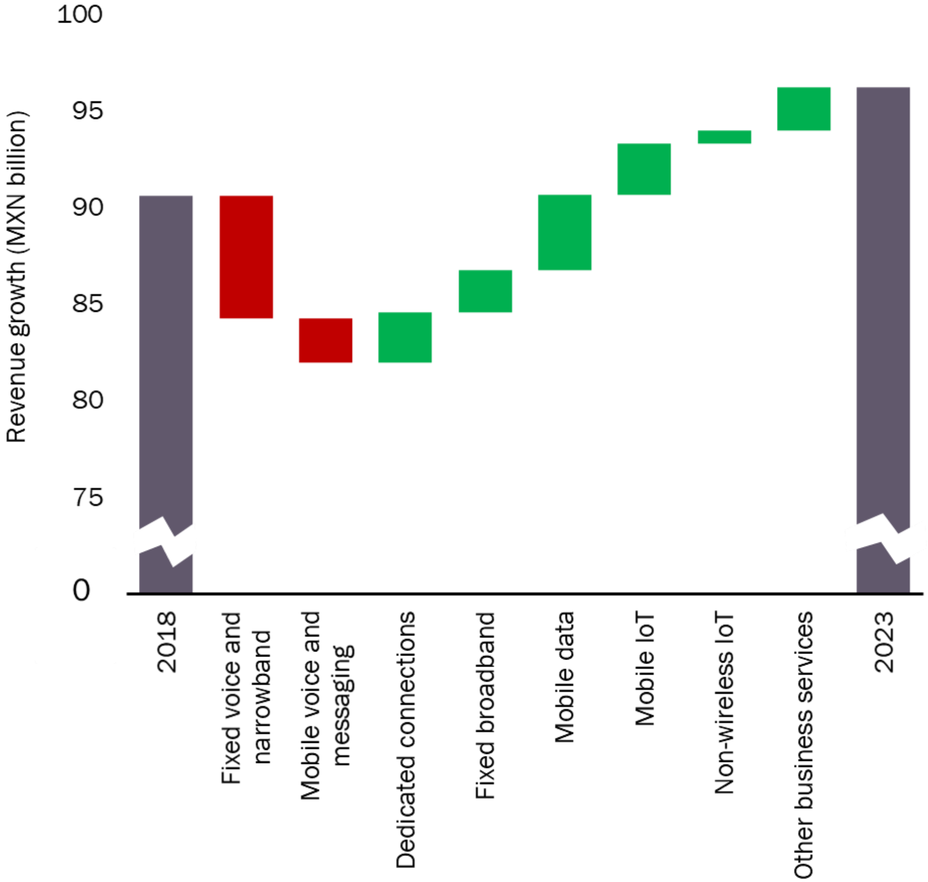
- Unified communications
- Security
- Co-location and hosting
- Private cloud
- Software-as-a-service (SaaS, public cloud)
- Platform-as-a-service (PaaS, public cloud)
- Infrastructure-as-a-service (IaaS, public cloud)
- Enterprise mobility
- Desktop management

[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]

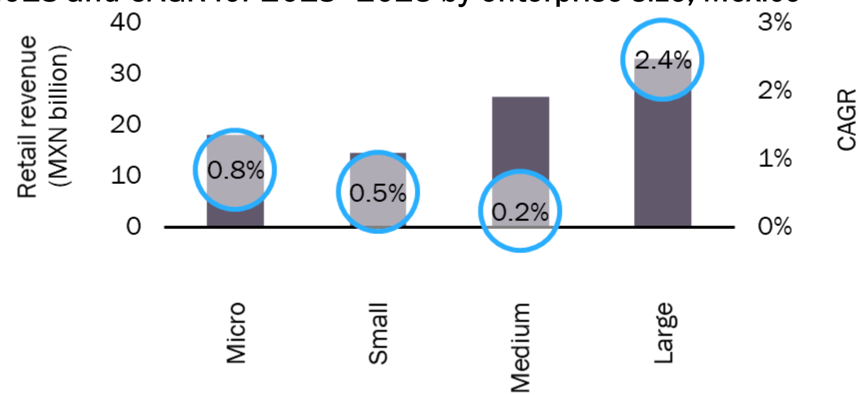


Source: Analysys Mason

Figure 2: Connections for enterprises and CAGRs by type of connection, Mexico, 2018–2023[2]

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, Mexico[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.

About the authors

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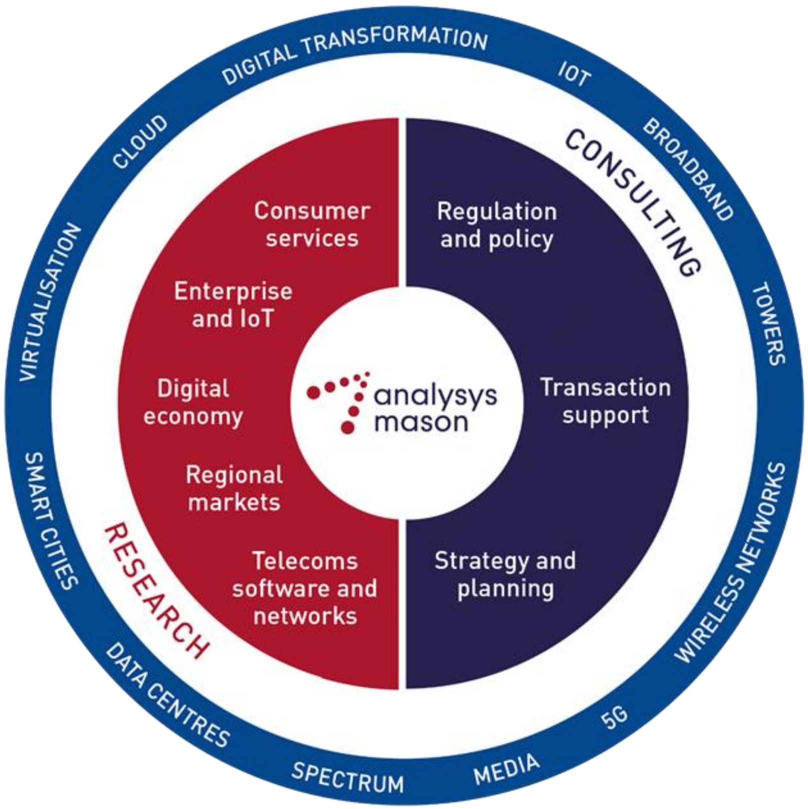

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