

RESEARCH FORECAST REPORT

# TELECOMS SERVICES FOR ENTERPRISES: NETHERLANDS FORECAST 2017-2022

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## About this report

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

It highlights that overall enterprise revenue for operators in the Netherlands will fall during the forecast period, driven by sharp declines in mobile and fixed voice revenues.

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, Statistics Netherlands, the Authority for Consumers and Markets, and from 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.

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

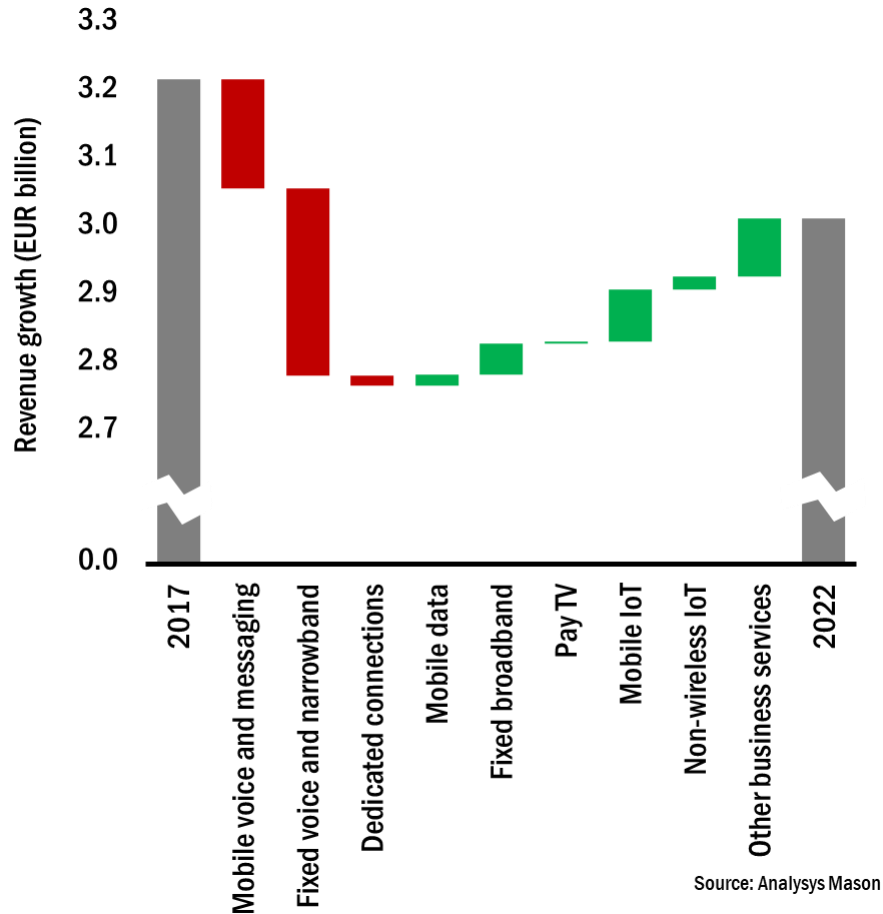
### REPORT COVERAGE

Geographical	Services <sup>2</sup>	
<b>Countries modelled individually:</b> <ul style="list-style-type: none"> <li>▪ Netherlands</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 (non-wireless)</li> <li>▪ Pay TV</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>2</sup> See service taxonomy in the 'Forecast methodology and assumptions' section of this report.

# Executive summary: falls in voice revenue will drive a decline in operator enterprise revenue over the forecast period

Figure 1: Change in telecoms operator retail revenue from enterprises by service type (where red denotes a decrease, and green an increase), Netherlands, 2017–2022<sup>1</sup>

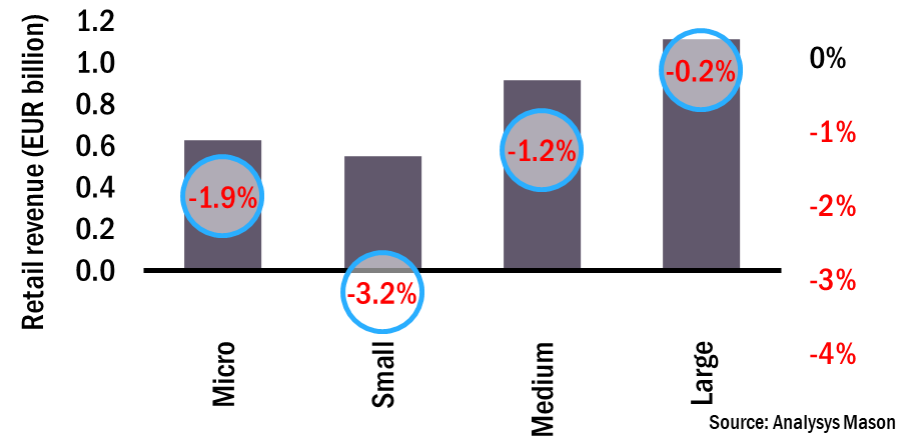


<sup>1</sup> See Presentation of results in the Methodology section of this report for full definitions of the aggregate categories presented in figures.

Figure 2: Connections for enterprises and CAGRs by type of connection, Netherlands, 2017–2022<sup>1</sup>

Connection type	Connections (thousand)		CAGR	
	2017	2022	2013–2017	2017–2022
Mobile handsets	3400	3500	1.5%	0.6%
Mobile broadband	600	500	7.0%	-3.6%
Mobile IoT	4900	14 300	31.9%	23.9%
Fixed voice	1300	1000	-13.4%	-5.1%
Fixed broadband	690	780	4.2%	2.5%
Fixed dedicated lines	168	176	0.7%	0.9%
Non-wireless IoT	1200	1900	18.4%	9.6%

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## About the authors



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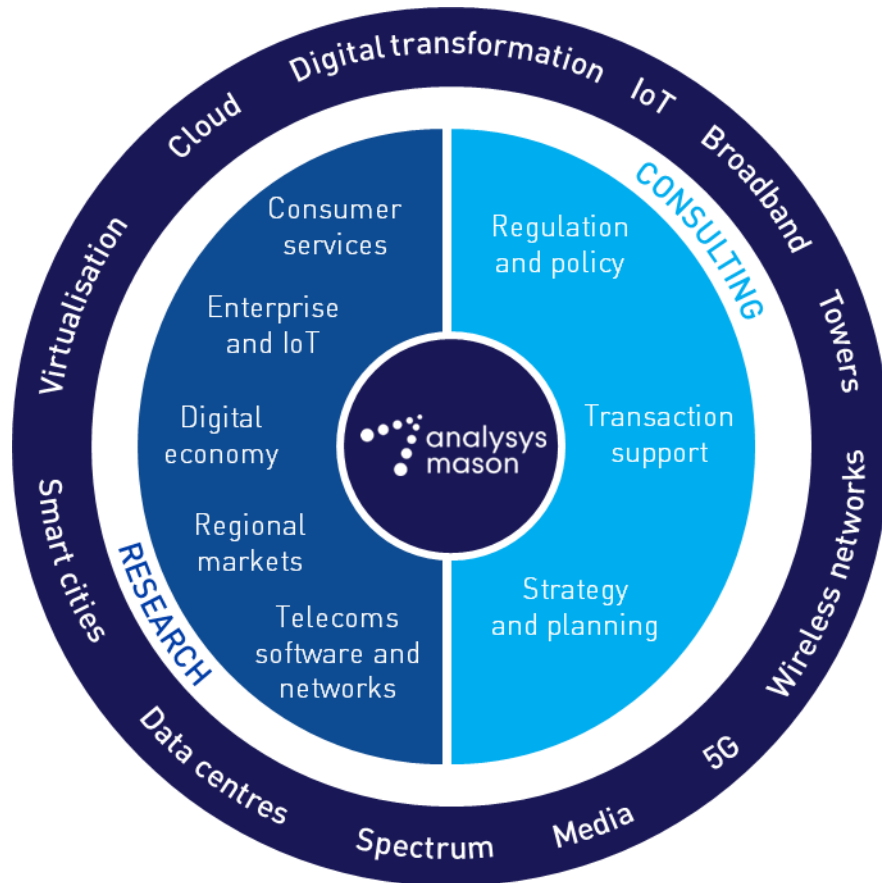


**Terry van Staden** (Research Analyst) is a member of Analysys Mason's *Enterprise and IoT* research practice and is mainly focusing on enterprise research reports and associated commentaries. He is conducting research into telecoms operators' enterprise revenue in addition to a cost analysis of their various enterprise services. Prior to joining Analysys Mason, Terry studied his masters in economics under full scholarship in South Africa where his research papers won, or were nominated for, several national awards. He is a member of the Golden Key International Honour Society and the recipient of the Gold Duke of Edinburgh's Award.



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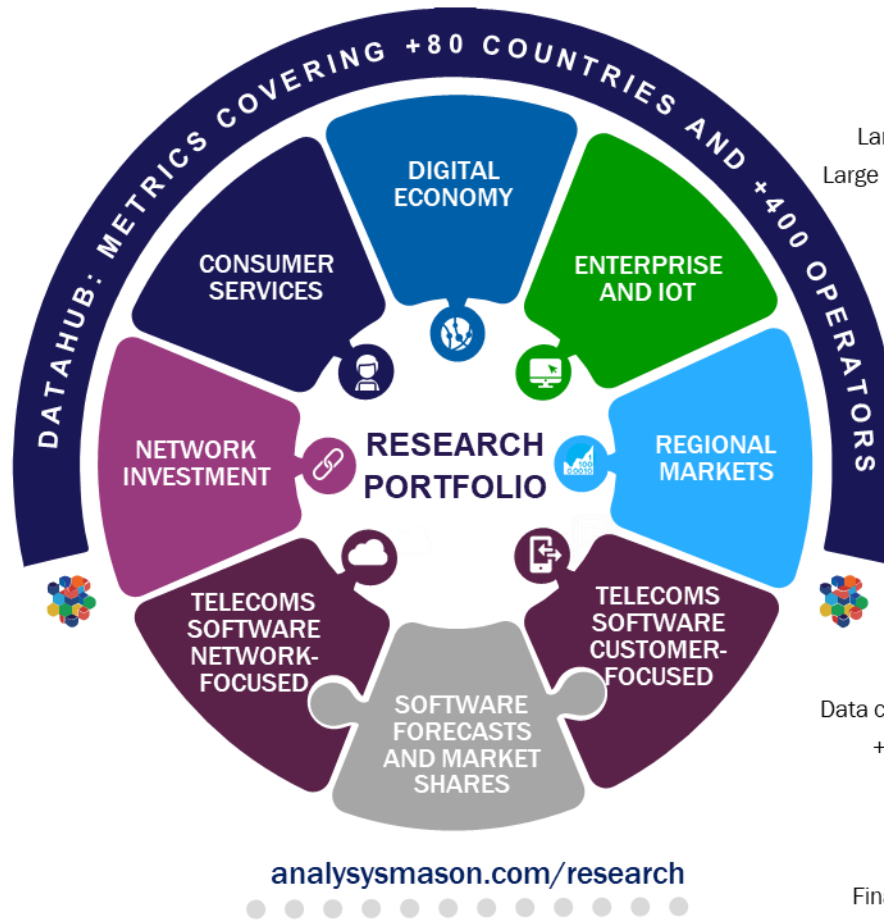
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  - AI and Analytics



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    - Americas
    - Asia-Pacific
    - Middle East and Africa
    - European Core Forecasts
    - European Telecoms Market Matrix
    - European Country Reports
- DataHub**
- Data covering +80 countries and +500 operators
  - +2300 forecast and +250 historical metrics
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  - Operator historical data
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  - Financial values in USD, EUR or local currency
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