



Operator business services: Brazil 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 Brazil 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 Brazilian Institute of Geography and Statistics, the National Telecommunications Agency 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

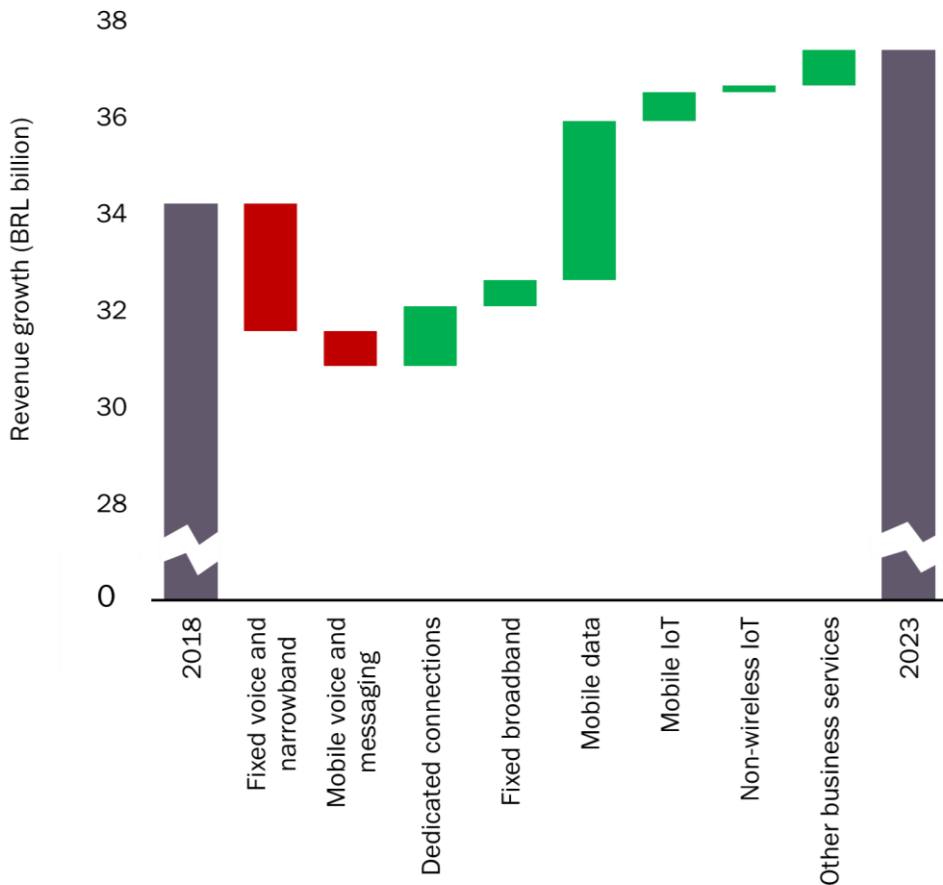
Geographical	Services ²	
Countries modelled individually: <ul style="list-style-type: none"> ▪ Brazil 	Mobile: <ul style="list-style-type: none"> ▪ Voice, messaging and handset data ▪ Mobile broadband ▪ IoT connectivity (mobile and LPWA) 	Other business services: <ul style="list-style-type: none"> ▪ 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 data and dedicated connections will drive operator enterprise revenue growth between 2018 and 2023

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



Source: Analysys Mason

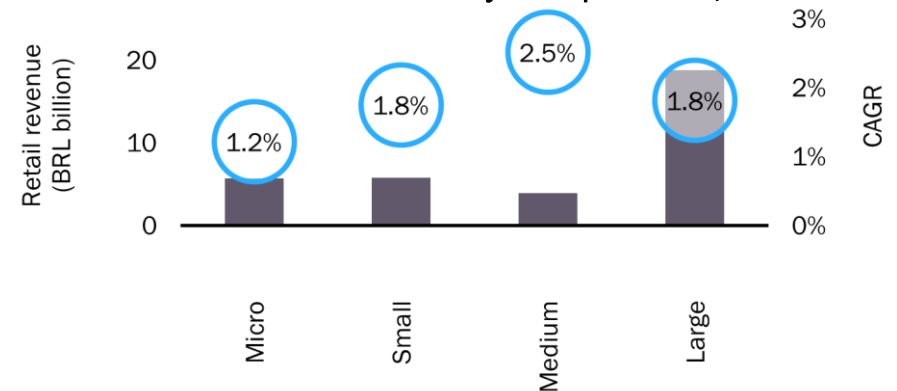
¹ Red denotes a decrease, and green an increase.

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, Brazil, 2018–2023²

Connection type	Connections (thousand)		CAGR	
	2018	2023	2014–2018	2018–2023
Mobile handsets	13 790	15 490	2.4%	2.4%
Mobile broadband	995	1082	9.7%	1.7%
Mobile IoT	18 120	64 050	16.1%	28.7%
Fixed voice	12 660	12 230	-2.3%	-0.7%
Fixed broadband	2821	3404	3.3%	3.8%
Fixed dedicated lines	249	279	1.5%	2.4%
Non-wireless IoT	16 900	29 290	22.8%	11.6%

Figure 3: Telecoms operator retail revenue from enterprises in 2018 and CAGR for 2018–2023 by enterprise size, Brazil²



Source: Analysys Mason



Executive summary

Forecast results

Forecast methodology and assumptions

About the authors and Analysys Mason

About the authors



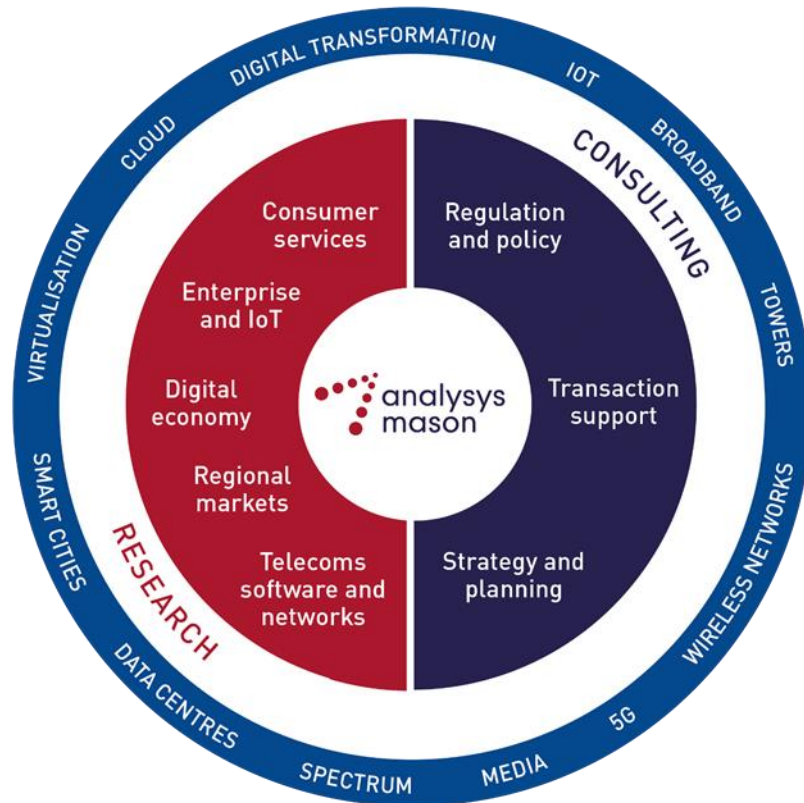
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