RESEARCH

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# Operator business services: Brazil forecast 2018–2023

Jakub Konieczny and Igor Babić

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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**

**Countries modelled individually:**

- Brazil

**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:**

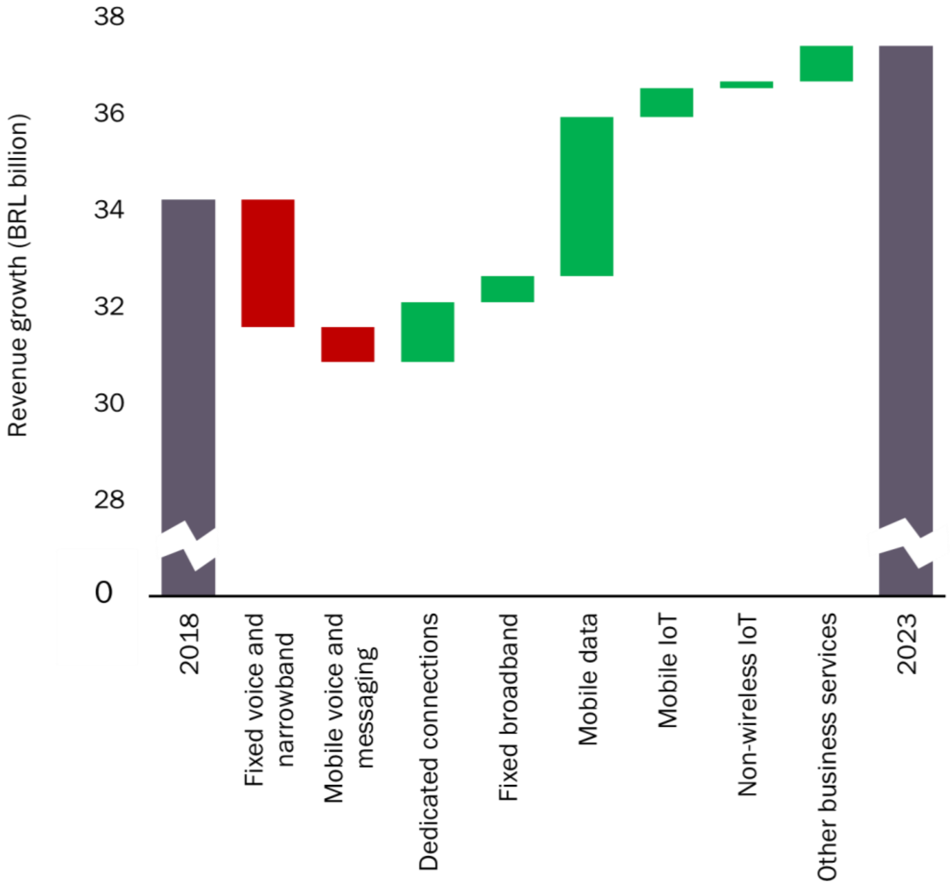
- Unified communications
- Security
- Co-location and hosting
- Private cloud
- Software-as-a-service (SaaS, public cloud)
- Platform-as-a-service (PaaS, public cloud)
- Infrastructure-as-a-service (IaaS, public cloud)
- Enterprise mobility
- Desktop management

[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 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]**

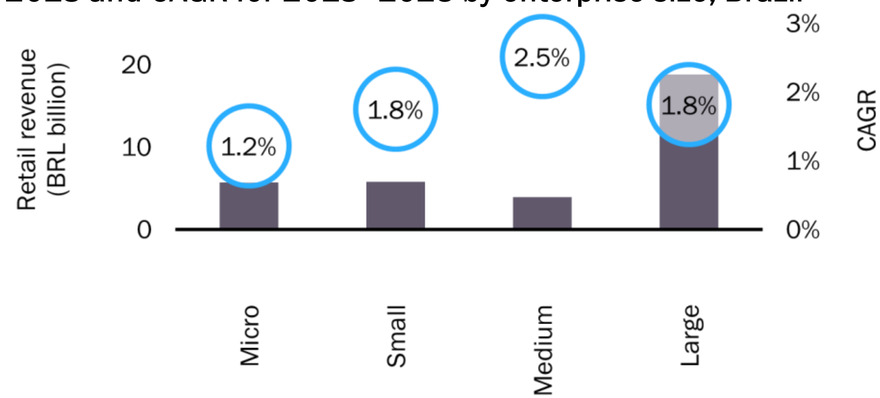



Source: Analysys Mason

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

| 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, Brazil[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.

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# About the authors

**Jakub Konieczny** (Intern Research Analyst) is a member of the regional markets research team in London, contributing mainly to the *Telecoms Market Matrix*, *European Country Reports* and *Global Telecoms Data* research programmes. Jakub hols a BEng in petroleum engineering from the University of Aberdeen.

**Igor Babić** (Research 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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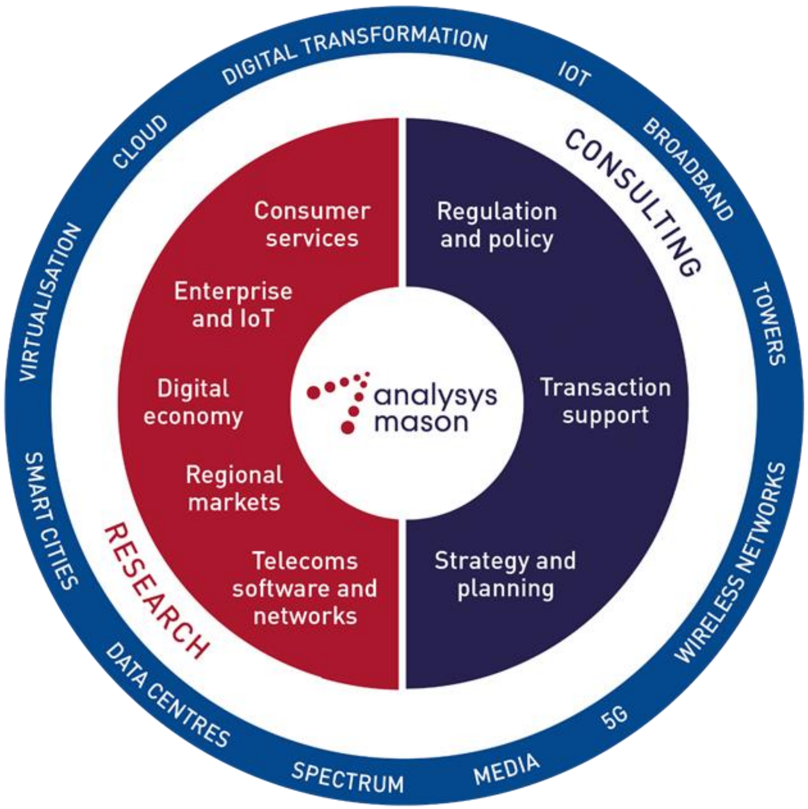


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PUBLISHED BY ANALYSYS MASON LIMITED IN **FEBRUARY 2019**

Bush House • North West Wing • Aldwych • London • WC2B 4PJ • UK

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