

RESEARCH FORECAST REPORT

# TELECOMS SERVICES FOR ENTERPRISES: NORWAY FORECAST 2017-2022

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## About this report

This report analyses the demand for telecoms services in Norway 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 Norway will fall during the forecast period, in spite of strong growth in revenue from mobile data, IoT and other business services.

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, the Central Statistics Office (Norway), the Commission for Communications Regulation, 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 the Analysys Mason [DataHub](#).

### REPORT COVERAGE

Geographical	Services <sup>2</sup>	
<b>Countries modelled individually:</b> <ul style="list-style-type: none"> <li>▪ Norway</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: declines in voice and messaging revenue will drive a fall in overall enterprise revenue despite growth in other services

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

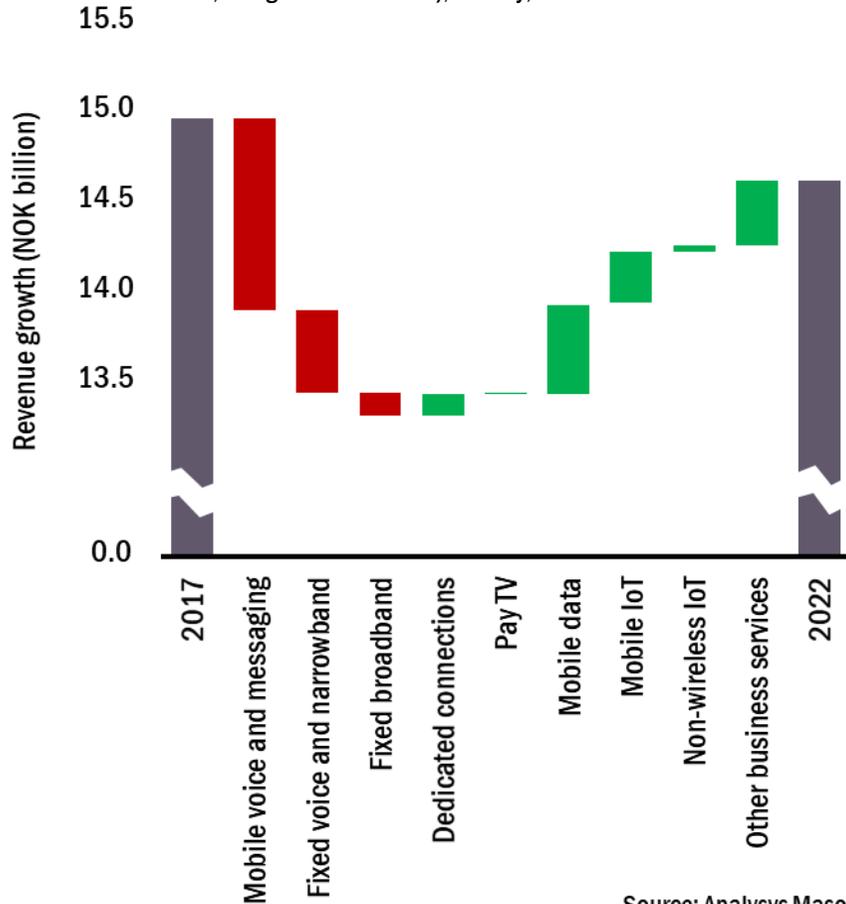
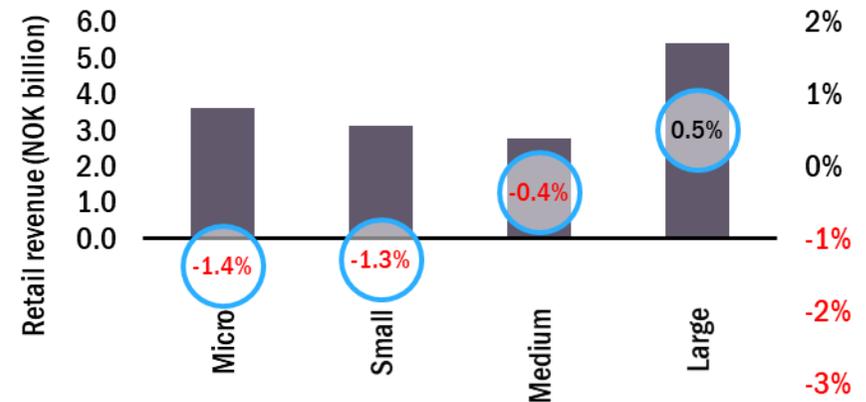


Figure 2: Connections for enterprises and CAGRs by type of connection, Norway, 2017-2022<sup>1</sup>

Connection type	Connections (thousand)		CAGR	
	2017	2022	2013-2017	2017-2022
Mobile handsets	1400	1500	0.4%	1.4%
Mobile broadband	200	100	3.7%	-12.9%
Mobile IoT	1500	5600	15.8%	30.1%
Fixed voice	300	200	-14.3%	-7.8%
Fixed broadband	130	140	-0.4%	1.5%
Fixed dedicated lines	40	41	1.0%	0.5%
Non-wireless IoT	1900	3900	37.6%	15.5%

Figure 3: Telecoms operator retail revenue from enterprises in 2017 and CAGR for 2017-2022 by enterprise size, Norway, 2017<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.

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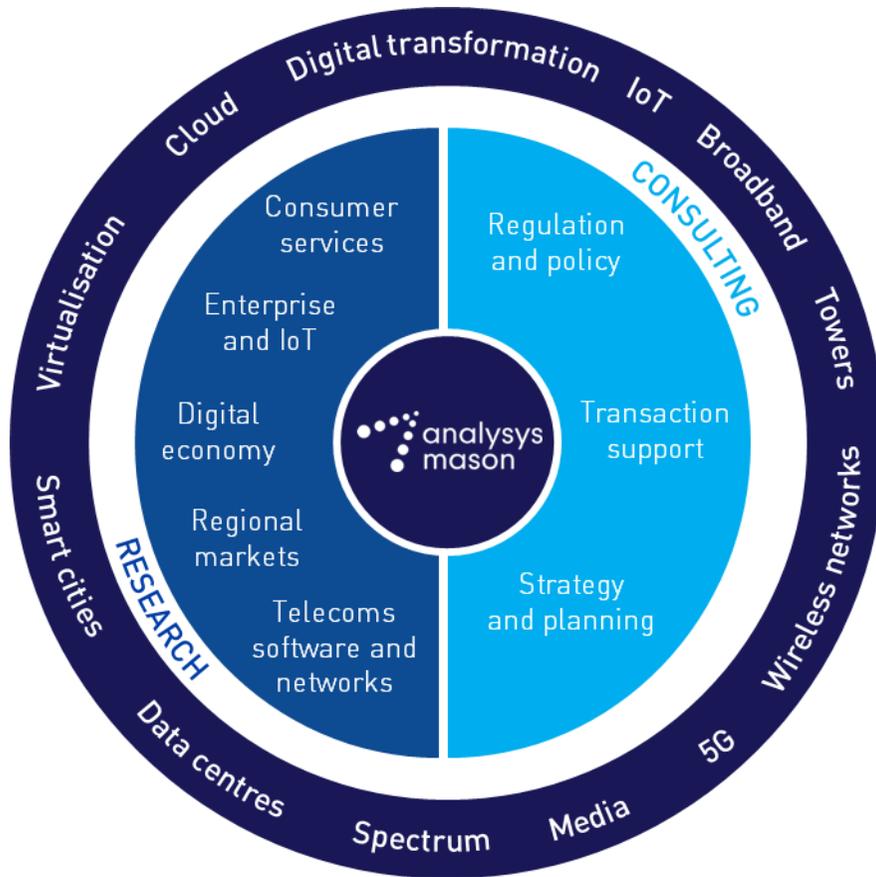
**Igor Babić** (Research Analyst) is a member of Analysys Mason's *Enterprise and IoT* research practice and is mainly focusing on market forecasting and enterprise research commentaries. Prior to joining Analysys Mason, he completed a BEng in Engineering Business Management at Warwick and an MPhil in Industrial Systems, Manufacture and Management at Cambridge.



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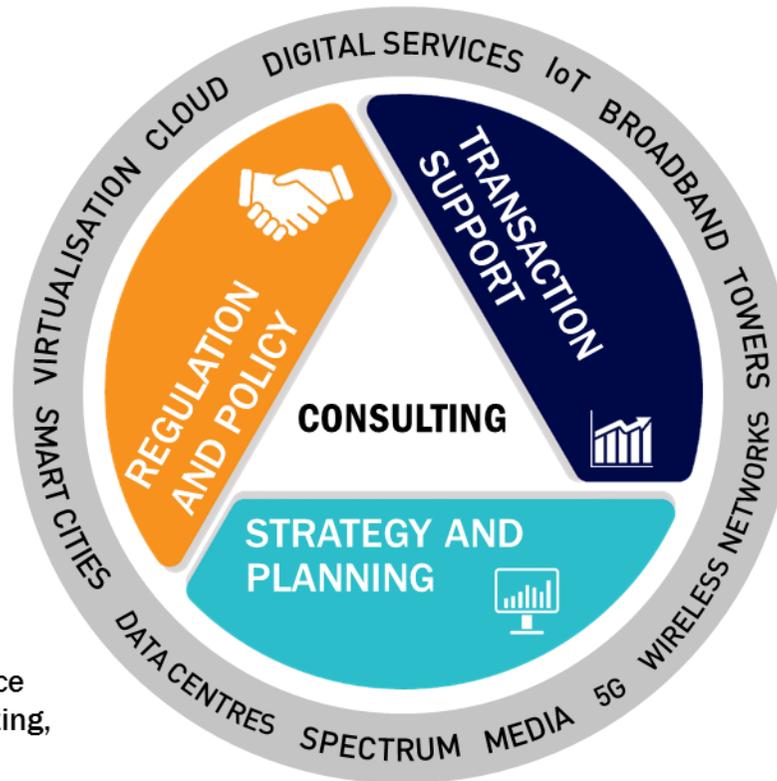


- Digital economy programmes**
    - Digital Economy Strategies
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    - Asia-Pacific
    - Middle East and Africa
    - European Core Forecasts
    - European Telecoms Market Matrix
    - European Country Reports
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