RESEARCH FORECAST REPORT

TELECOMS SERVICES FOR ENTERPRISES: SINGAPORE 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).[1]

It highlights that overall enterprise revenue for operators will fall during the forecast period 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, enterprise mobility and software-as-a-service (SaaS).

The report is based on several sources, including data from operators, the Singapore Department of Statistics, the Info-communications Media Development Authority 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:

- Singapore

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.

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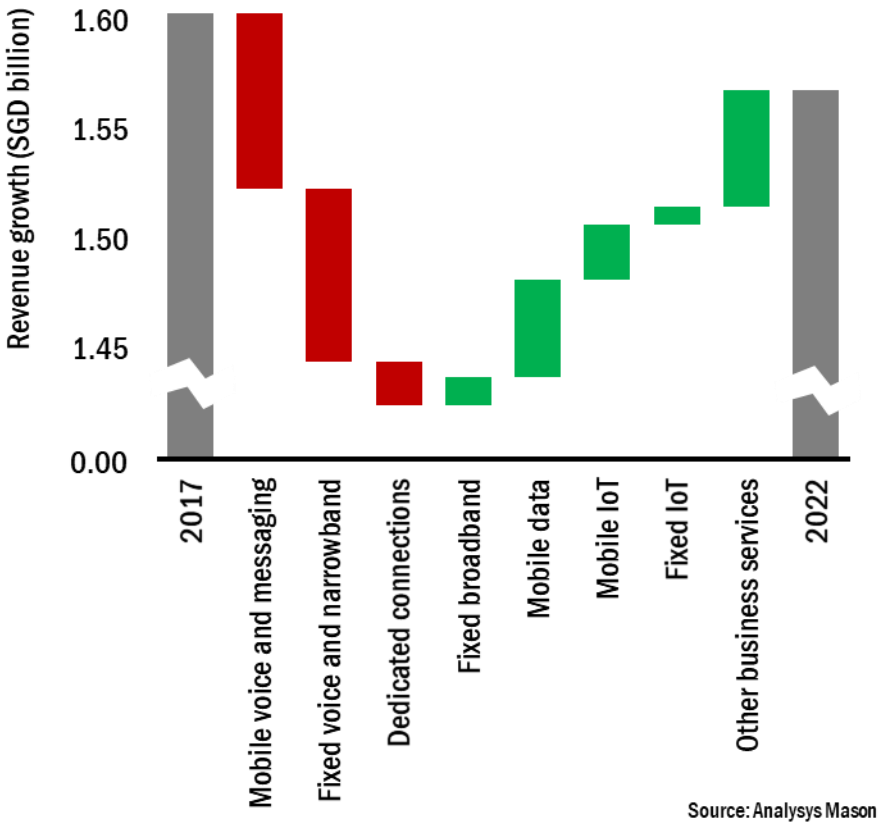
Executive summary: operator enterprise revenue will fall during the forecast period, and will shift away from legacy services

Figure 1: Change in telecoms operator retail revenue from enterprises by service type (where red denotes a decrease, and green an increase), Singapore, 2017–2022[1]

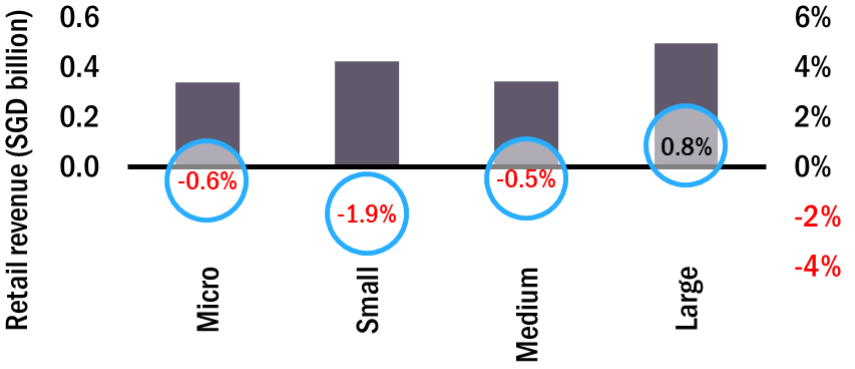


Source: Analysys Mason

Figure 2: Connections for enterprises and CAGRs by type of connection, Singapore, 2017–2022[1]

Connection type	Connections (thousand)		CAGR	CAGR
	2017	2022	2013–2017	2017–2022
Mobile handsets	800	900	6.6%	2.4%
Mobile broadband	100	100	9.2%	0.0%
Mobile IoT	300	2400	28.4%	51.6%
Fixed voice	700	700	0.4%	0.0%
Fixed broadband	130	160	7.3%	4.2%
Fixed dedicated lines	25	28	3.2%	2.3%
Non-wireless IoT	1300	2500	39.7%	14.0%

Figure 3: Telecoms operator retail revenue from enterprises in 2017 and CAGR for 2017–2022 by enterprise size, Singapore, 2017[1]



Source: Analysys Mason

[1] 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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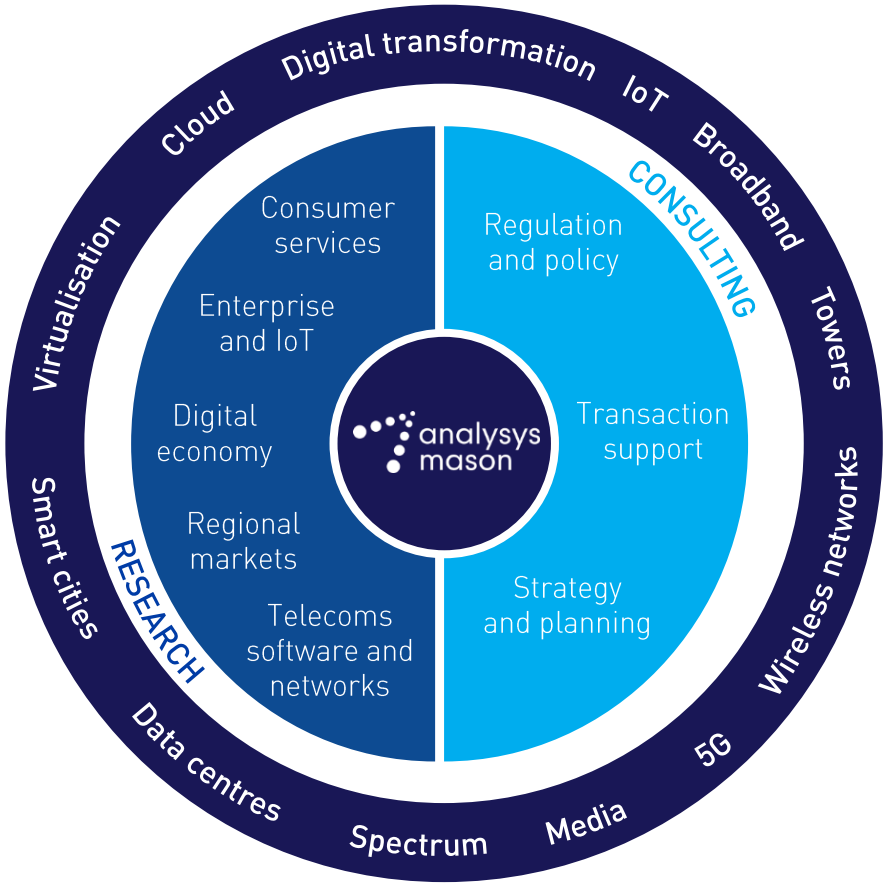

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- Radio spectrum auction support
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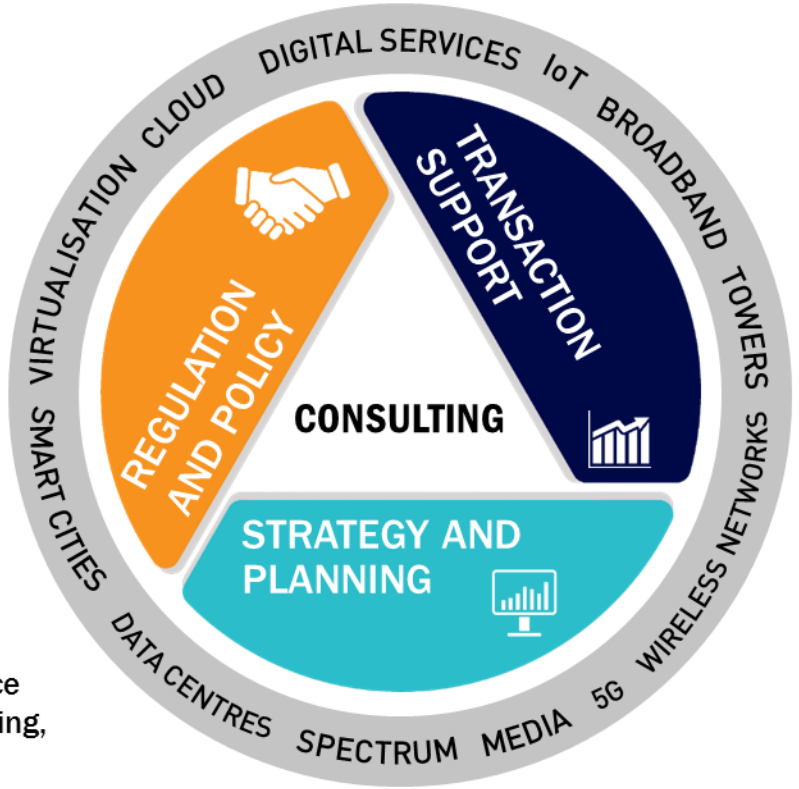

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