



Telecoms services for enterprises: India forecast 2018–2023



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 average revenue per user (ARPU).¹

The report highlights that operator enterprise revenue in India 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 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 Indian Central Statistics Office, the Telecom Regulatory Authority of India 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

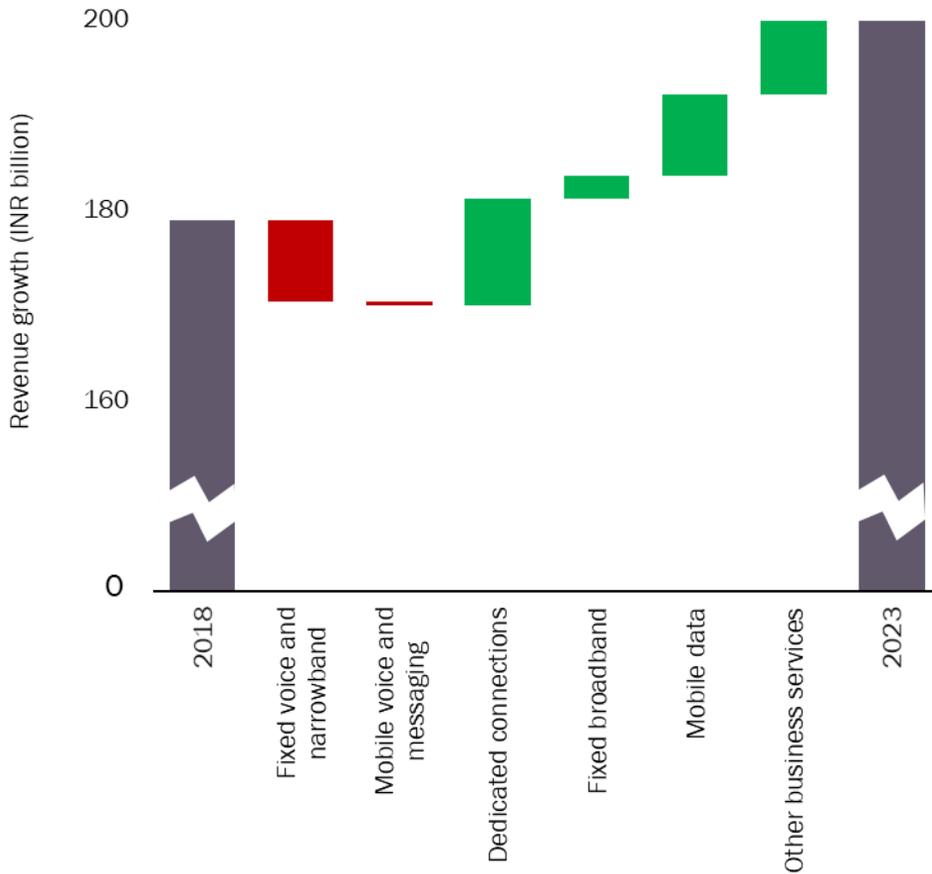
Geographical	Services ²	
Countries modelled individually: <ul style="list-style-type: none"> ▪ India 	Mobile: <ul style="list-style-type: none"> ▪ Voice, messaging and handset data ▪ Mobile broadband Fixed: <ul style="list-style-type: none"> ▪ Narrowband and VoBB ▪ ADSL/SDSL, vDSL, FTTP/B, cable, BFWA, other fixed broadband ▪ Dedicated connections up to 100Mbps, >100Mbps and up to 1Gbps, and >1Gbps ▪ Traditional managed services 	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		
Segments: <ul style="list-style-type: none"> ▪ Micro (0–9 employees) ▪ Small (10–49 employees) ▪ Medium (50–249 employees) ▪ Large (250+ employees) 		

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. IoT connectivity services are excluded from this report.

Executive summary: increases in the number of dedicated connections, mobile data and other business services revenue will drive operator enterprise revenue growth

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

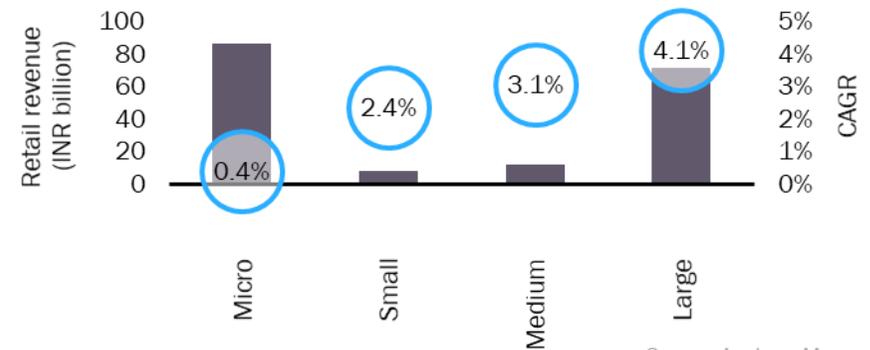


Source: Analysys Mason

Figure 2: Connections for enterprises and CAGRs by type of connection, India, 2018–2023¹

Connection type	Connections (thousand)		CAGR	
	2018	2023	2014–2018	2018–2023
Mobile handsets	18 710	24 560	3.8%	5.6%
Mobile broadband	2809	3514	16.3%	4.6%
Fixed voice	7940	7190	-10.1%	-2.0%
Fixed broadband	2980	4120	9.8%	6.7%
Fixed dedicated lines	97.0	122.9	1.9%	4.8%

Figure 3: Telecoms operator retail revenue from enterprises in 2018 and CAGR for 2018–2023 by enterprise size, India¹



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.

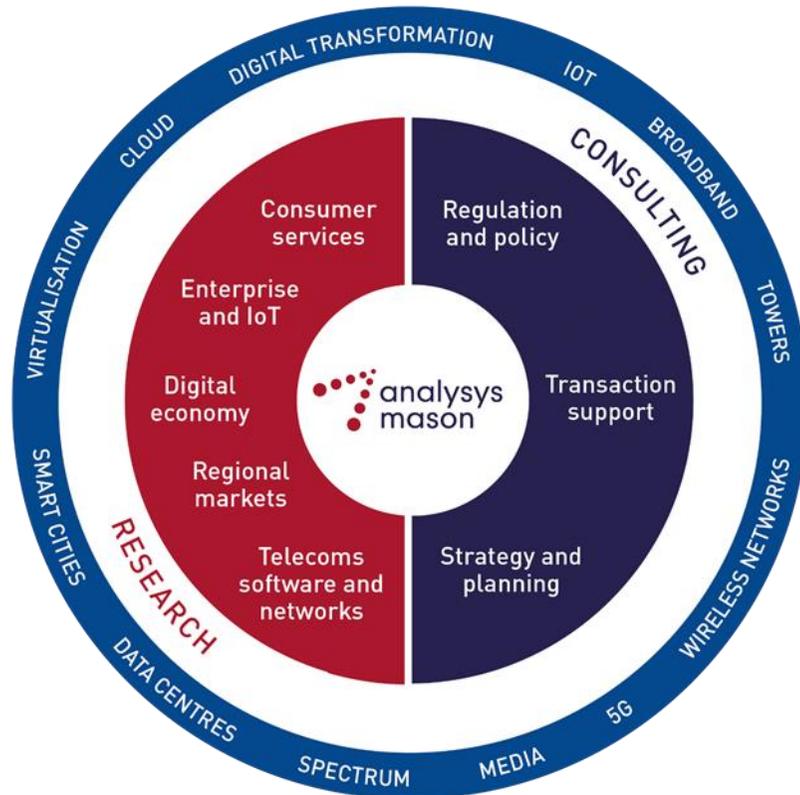
About the author



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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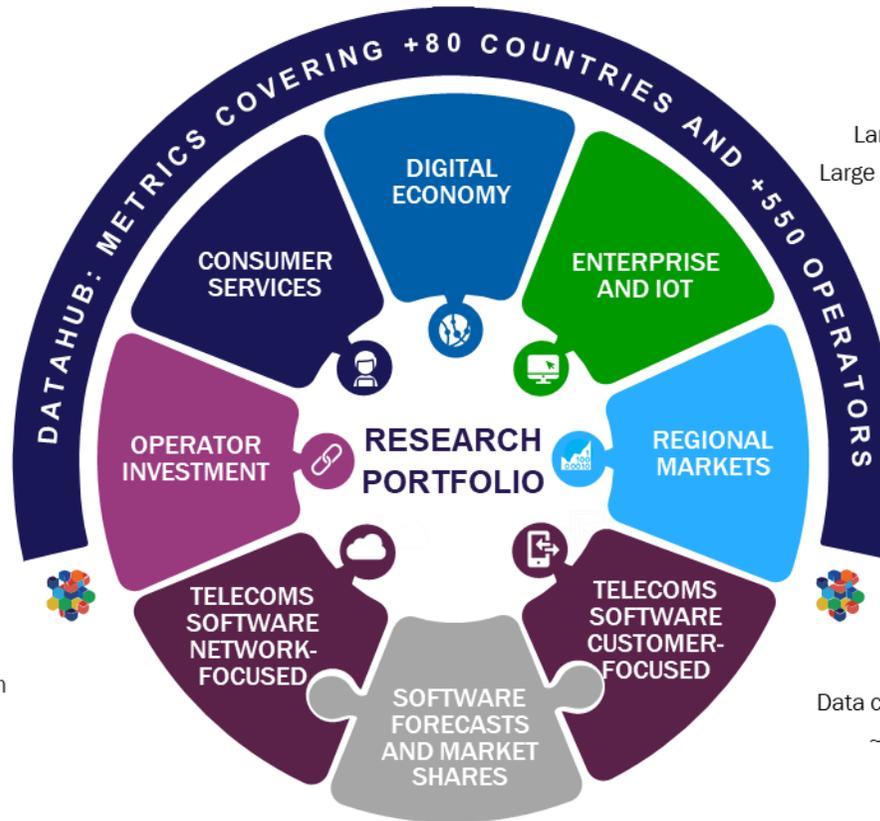
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PUBLISHED BY ANALYSYS MASON LIMITED IN **OCTOBER 2018**

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

Tel: +44 (0)20 7395 9000 • Email: research@analysismason.com • www.analysismason.com/research • Registered in England and Wales No. 5177472

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