

RESEARCH FORECAST REPORT

# TELECOMS SERVICES FOR ENTERPRISES: QATAR FORECAST 2018-2023

IGOR BABIĆ and CATHERINE HAMMOND

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## About this report

This report analyses the demand for telecoms services in Qatar by micro, small and medium-sized enterprises (SMEs) and large enterprises, expressed in terms of revenue, the number of connections or users and average revenue per user (ARPU).<sup>1</sup> It highlights that operator enterprise revenue in Qatar will grow during the forecast period, supported by an expected increase in the number of employees and businesses in the country.

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 Qatari Ministry of Transport and Communications and Communications Regulatory Authority, as well as 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 Analysys Mason’s [DataHub](#).

### REPORT COVERAGE

Geographical	Services <sup>2</sup>	
<b>Countries modelled individually:</b> <ul style="list-style-type: none"> <li>▪ Qatar</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> </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.

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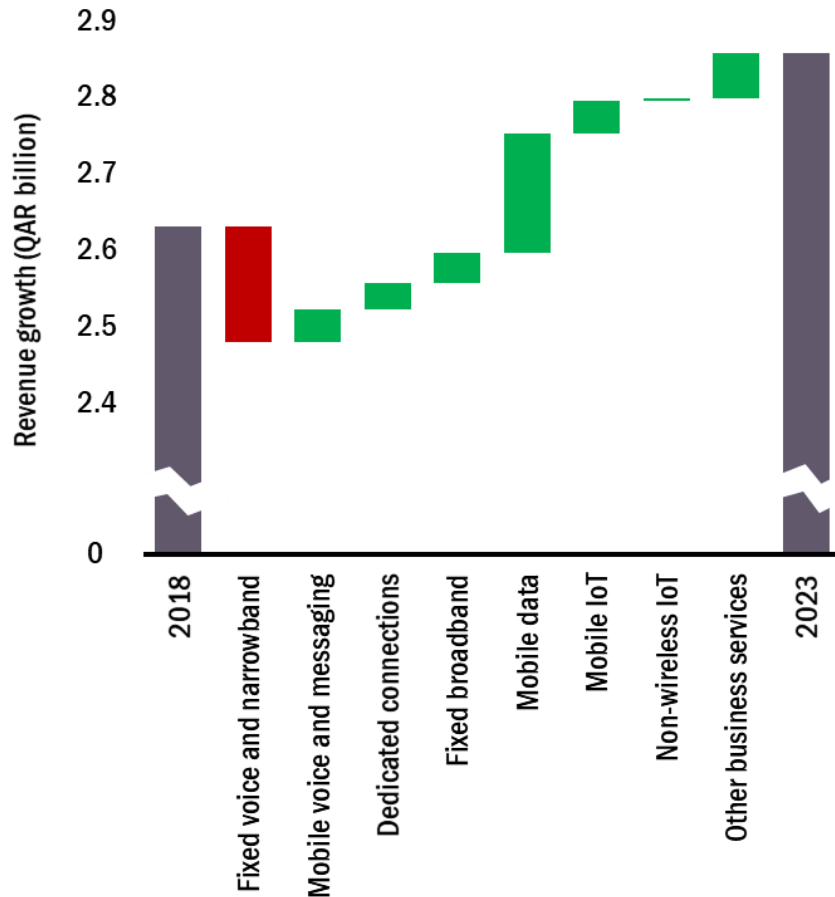
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# Executive summary: operator enterprise revenue will increase, primarily due to growth in mobile data and other business services revenue

Figure 1: Change in telecoms operator retail revenue from enterprises by service type (where red denotes a decrease, and green an increase), Qatar, 2018–2023<sup>1</sup>

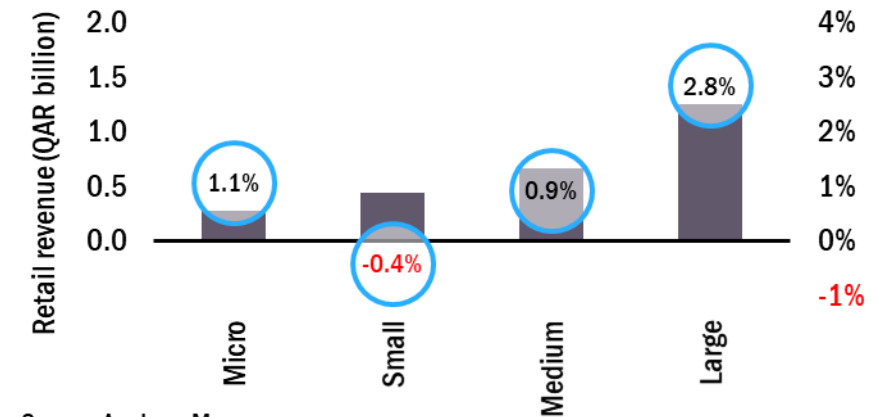


<sup>1</sup> See Presentation of results in the Methodology section of this report for full definitions of the aggregate categories presented in figures.

Figure 2: Connections for enterprises and CAGRs by type of connection, Qatar, 2018–2023<sup>1</sup>

Connection type	Connections (thousand)		CAGR	
	2018	2023	2013–2018	2018–2023
Mobile handsets	550	670	8.3%	4.0%
Mobile broadband	100	140	49.0%	7.0%
Mobile IoT	200	800	41.5%	32.0%
Fixed voice	240	270	3.8%	2.4%
Fixed broadband	20	30	6.2%	8.4%
Fixed dedicated lines	7	7	4.4%	2.0%
Non-wireless IoT	450	620	25.1%	6.6%

Figure 3: Telecoms operator retail revenue from enterprises in 2018 and CAGR for 2018–2023 by enterprise size, Qatar, 2018<sup>1</sup>



Source: Analysys Mason

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## About the authors



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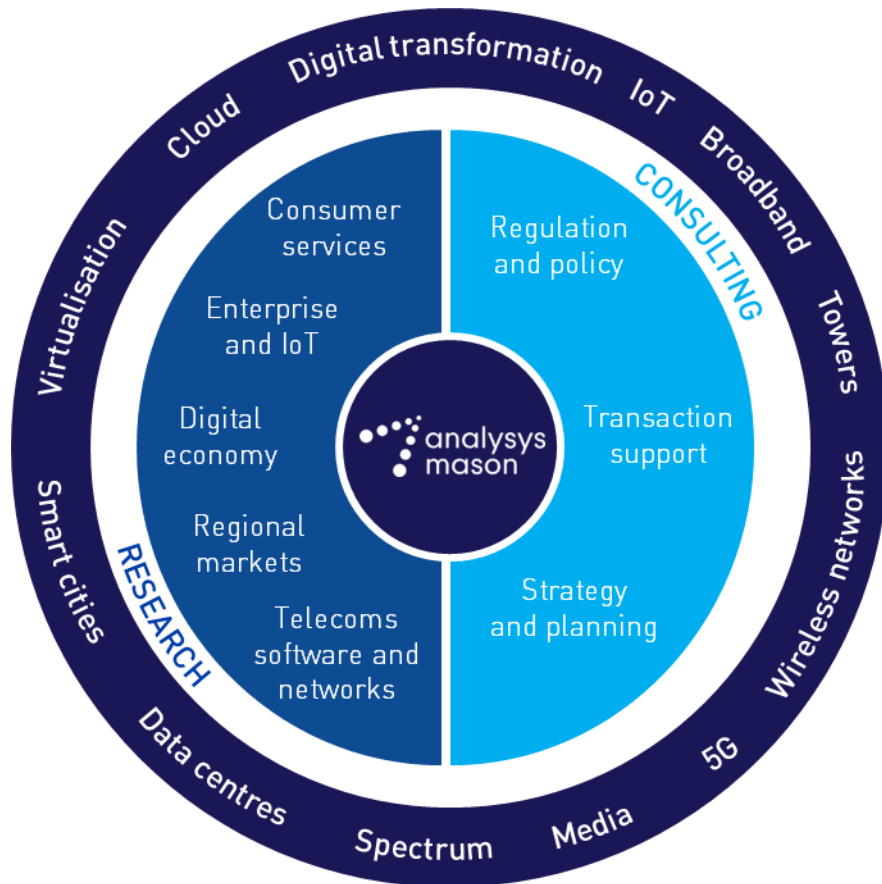


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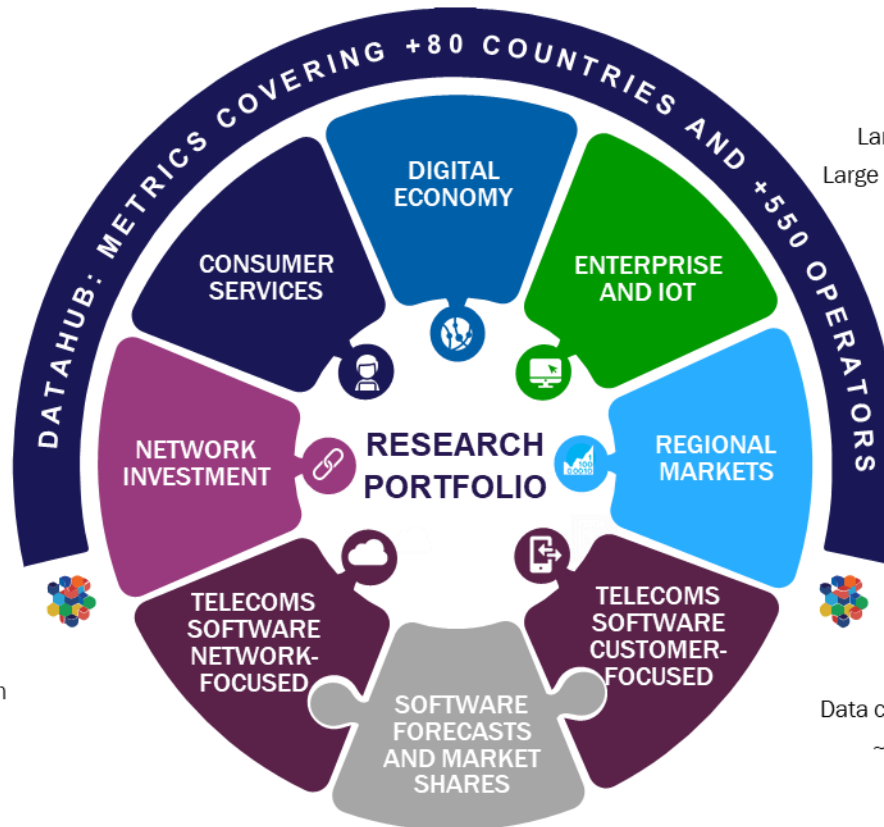
- We deliver tangible benefits to clients across the telecoms industry:
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  - European Telecoms Market Matrix
  - European Country Reports

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