

RESEARCH FORECAST REPORT

TELECOMS SERVICES FORECAST FOR SMALL AND MEDIUM-SIZED ENTERPRISES: EMERGING ASIA-PACIFIC 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), expressed in terms of revenue, connections or users, and average revenue per user (ARPU).¹

It identifies that markets for both mobile and fixed data connectivity services is growing across the region.

It also quantifies the emerging market for other business services, such as security, colocation and hosting, enterprise mobility and software-as-a-service (SaaS), which offer longer-term prospects for revenue growth.

It is based on several sources, including data from operators, national regulators, government agencies and other third parties, 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 SME segments and individual services.
- Vendors that are considering targeting the SME market.
- Third-party service providers seeking collaborative relations with Operators.

¹ For the complete data set, see the accompanying Excel file at www.analysysmason.com/smes-forecasts2017-emap-rdmz0.

REPORT COVERAGE

Geographical	Services ²	
Regions modelled: <ul style="list-style-type: none"> ▪ Emerging Asia-Pacific Countries modelled individually: <ul style="list-style-type: none"> ▪ China ▪ India ▪ Indonesia ▪ Malaysia ▪ Philippines 	Mobile: <ul style="list-style-type: none"> ▪ Voice, messaging and handset data ▪ Mobile broadband ▪ IoT connectivity (mobile and LPWA) 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 ▪ IoT connectivity 	Other business services: <ul style="list-style-type: none"> ▪ Unified communications ▪ Security ▪ Colocation 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) 		

² See service taxonomy on slides 26–30.

Contents

6. Executive summary

- 7. Executive summary: Operator revenue from SMEs will continue to rise, supported by strong growth in mobile data services

8. Regional forecasts

- 9. Operator revenue from SMEs will continue to be dominated by mobile services
- 10. All SME segments will deliver revenue growth with a focus on mobile; fixed data will become increasingly important for medium enterprises
- 11. A continued increase in penetration levels and the prevalence of smartphones will support strong revenue growth for mobile services
- 12. Falling voice revenue will lead to a further decline in fixed services revenue despite growth in data connectivity
- 13. Recent and ongoing fibre roll-out in the region is driving growth in the number of broadband connections to SMEs
- 14. Many markets for other business services will experience rapid growth, offering operators an opportunity to have a share in new revenue streams
- 15. Key other business services for operators include colocation and hosting, security and enterprise mobility

16. Country-level forecasts

- 17. China: Mobile data services will continue to dominate revenue and drive modest growth
- 18. India: An increase in revenue from data connectivity and IoT services will contribute to healthy growth for the sector

- 19. Indonesia: Recent rapid growth in fixed broadband will slow, causing overall revenue to stabilise as voice declines

- 20. Malaysia: Revenue will slowly decline in a largely saturated market despite an increase in FTTP and mobile data usage

- 21. Philippines: Increasing demand for fixed and mobile data connectivity will drive overall revenue growth

22. Forecast methodology and assumptions

- 23. Forecast methodology and assumptions: Presentation of results
- 24. Forecast methodology and assumptions: Market definition
- 25. Forecast methodology and assumptions: Modelling approach
- 26. Forecast methodology and assumptions: Mobile services
- 27. Forecast methodology and assumptions: Fixed services [1]
- 28. Forecast methodology and assumptions: Fixed services [2]
- 29. Forecast methodology and assumptions: Other business services [1]
- 30. Forecast methodology and assumptions: Other business services [2]
- 31. Forecast methodology and assumptions: Geographical region

32. About the author and Analysys Mason

- 33. About the author
- 34. Analysys Mason's consulting and research are uniquely positioned
- 35. Research from Analysys Mason
- 36. Consulting from Analysys Mason

List of figures [1]

Figure 1: Retail revenue from SMEs by service type, emerging Asia-Pacific, 2013–2022

Figure 2: Connections for SMEs and CAGRs by type of connection, emerging Asia-Pacific, 2017–2022

Figure 3: Percentages of retail revenue, total employees and total enterprises by enterprise size, emerging Asia-Pacific, 2017

Figure 4: Percentage of retail revenue from SMEs in 2017 and CAGR for 2017–2022 by service type, emerging Asia-Pacific

Figure 5: Retail revenue from SMEs by service type, emerging Asia-Pacific, 2013–2022

Figure 6: Percentages of business site, total employees and total enterprises by enterprise size, emerging Asia-Pacific, 2017

Figure 7: Retail revenue from SMEs by service type and enterprise size, emerging Asia-Pacific, 2017 and 2022

Figure 8: Percentages of mobile service retail revenue and total employees by enterprise size, emerging Asia-Pacific, 2017

Figure 9: Mobile service retail revenue and connections for SMEs, emerging Asia-Pacific, 2013–2022

Figure 10: Percentages of fixed service retail revenue and total business sites by enterprise size, emerging Asia-Pacific, 2017

Figure 11: Fixed service retail revenue and connections for SMEs, emerging Asia-Pacific, 2013–2022

Figure 12: Percentage of SME fixed broadband connections by type of connection, emerging Asia-Pacific, 2013–2022

Figure 13: Percentage of SME dedicated connections by connection speed, emerging Asia-Pacific, 2013–2022

Figure 14: Percentages of total business sites in 2017 and other business services retail revenue in 2017 and 2022 by enterprise size, emerging Asia-Pacific

Figure 15: Retail revenue from SMEs' other business services by service type, emerging Asia-Pacific, 2013–2022

Figure 16: Retail revenue from other business services and CSPs' share, emerging Asia-Pacific, 2022

Figure 17: Retail revenue from SMEs by service type, China, 2013–2022

Figure 18: Connections for SMEs and CAGRs by type of connection, China, 2017–2022

Figure 19: Percentages of retail revenue, total employees and total enterprises by enterprise size, China, 2017

Figure 20: Retail revenue from SMEs by service type, India, 2013–2022

Figure 21: Connections for SMEs and CAGRs by type of connection, India, 2017–2022

Figure 22: Percentages of retail revenue, total employees and total enterprises by enterprise size, India, 2017

List of figures [2]

Figure 23: Retail revenue from SMEs by service type, Indonesia, 2013–2022

Figure 24: Connections for SMEs and CAGRs by type of connection, Indonesia, 2017–2022

Figure 25: Percentages of retail revenue, total employees and total enterprises by enterprise size, Indonesia, 2017

Figure 26: Retail revenue for telecoms operators from SMEs by service type, Malaysia, 2013–2022

Figure 27: Connections for SMEs and CAGRs by type of connection, Malaysia, 2017–2022

Figure 28: Percentages of retail revenue, total employees and total enterprises by enterprise size, Malaysia, 2017

Figure 29: Retail revenue for telecoms operators from SMEs by service type, Philippines, 2013–2022

Figure 30: Connections for SMEs and CAGRs by type of connection, Philippines, 2017–2022

Figure 31: Percentages of retail revenue, total employees⁵ and total enterprises by enterprise size, Philippines, 2017

Figure 32: Percentage of total SMEs, employees and business sites by enterprise size, emerging Asia-Pacific, 2017

Figure 33: Diagram of the forecast modelling approach

Figure 34: Definitions and key drivers for mobile services

Figure 35a: Definitions and key drivers for fixed services

Figure 35b: Definitions and key drivers for fixed services

Figure 36a: Definitions and key drivers for other business services

Figure 36b: Definitions and key drivers for other business services

Figure 37: Regional breakdown used in this report

CONTENTS

EXECUTIVE SUMMARY

REGIONAL FORECAST

COUNTRY-LEVEL FORECASTS

CHINA

INDIA

INDONESIA

MALAYSIA

PHILIPPINES

FORECAST METHODOLOGY AND ASSUMPTIONS

ABOUT THE AUTHOR AND ANALYSYS MASON

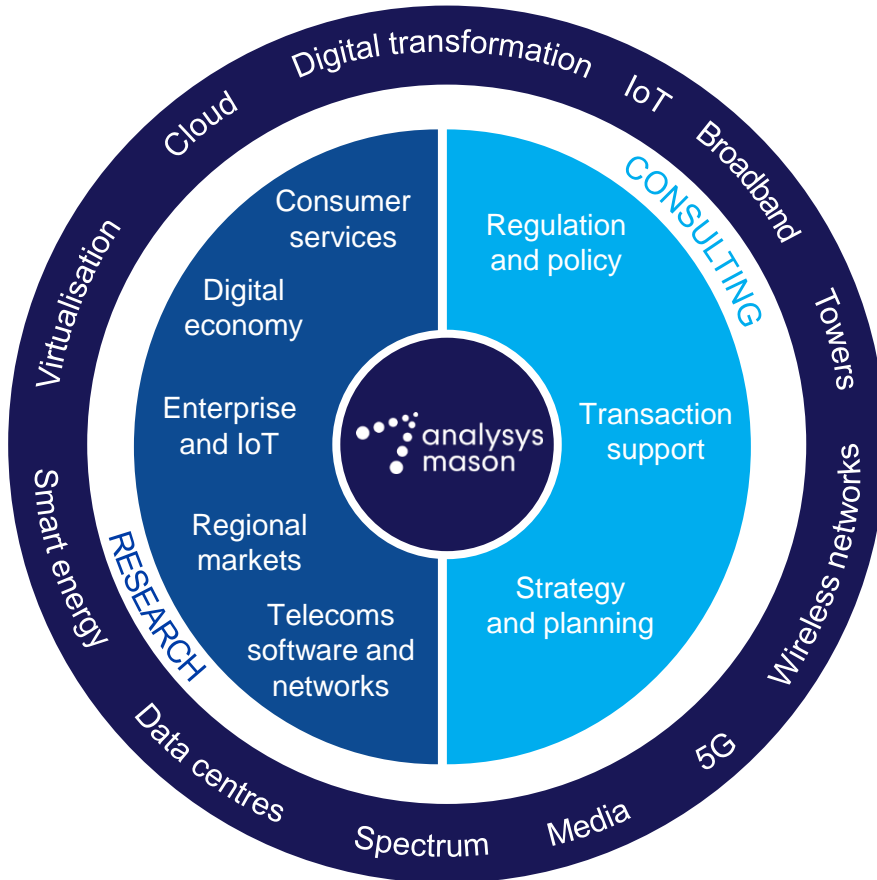
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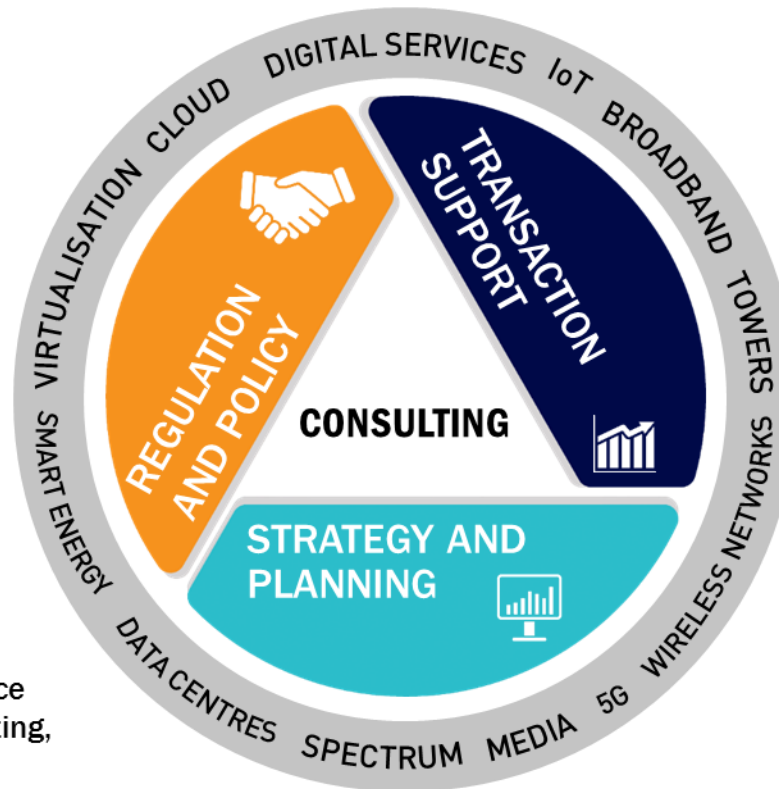
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- Market review
- Margin squeeze tests
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- Regulatory economic costing
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- Radio spectrum management
- Net cost of universal service
- Radio spectrum auction support
- Postal sector policy: universal service obligation (USO), liberalisation, costing, pricing and regulation



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PUBLISHED BY ANALYSYS MASON LIMITED IN NOVEMBER 2017

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

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