

RESEARCH FORECAST REPORT

TELECOMS SERVICES FOR ENTERPRISES: UAE FORECAST 2018-2023

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About this report

This report analyses the demand for telecoms services in the United Arab Emirates (UAE) 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).¹ It highlights that operator enterprise revenue in the UAE will grow between 2018 and 2023, supported by a 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 UAE Telecommunications Regulatory Authority, the UAE Ministry of Economy, 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.

¹ For the complete data set, see Analysys Mason’s [DataHub](#).

REPORT COVERAGE		
Geographical	Services ²	
Countries modelled individually: <ul style="list-style-type: none"> ▪ UAE 	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 (non-wireless) 	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) 		

² See service taxonomy in the ‘Forecast methodology and assumptions’ section of this report.

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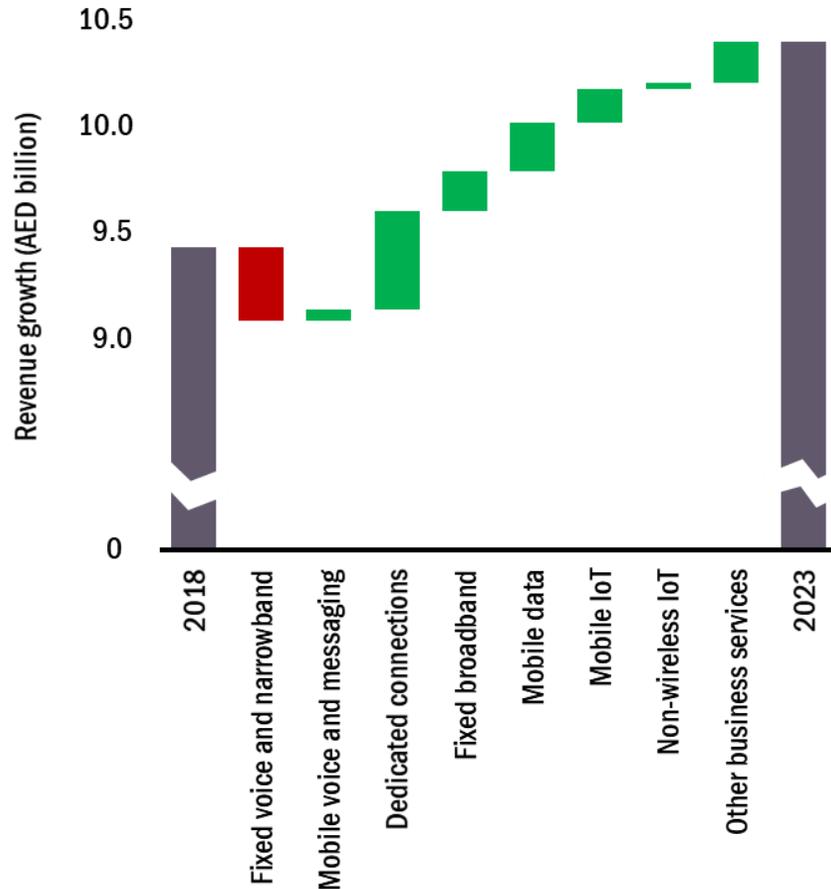
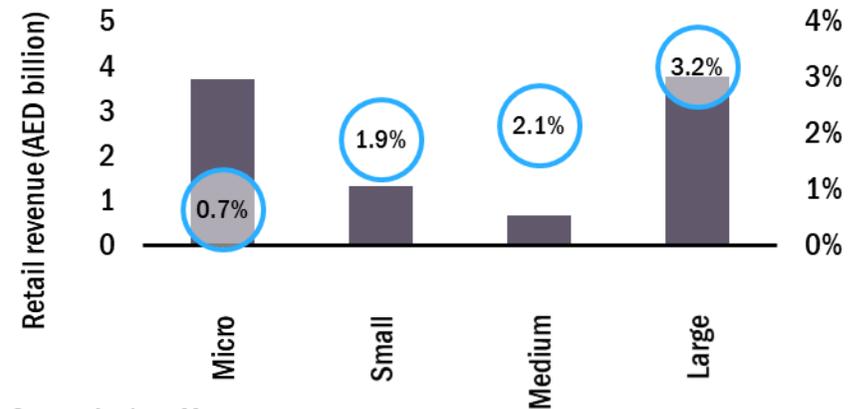


Figure 2: Connections for enterprises and CAGRs by type of connection, UAE, 2018–2023¹

Connection type	Connections (thousand)		CAGR	
	2018	2023	2013–2018	2018–2023
Mobile handsets	1200	1400	9.2%	3.1%
Mobile broadband	330	340	7.4%	0.6%
Mobile IoT	900	4400	41.8%	37.4%
Fixed voice	1000	1000	2.8%	0.0%
Fixed broadband	150	180	5.5%	3.7%
Fixed dedicated lines	25	27	3.9%	1.6%
Non-wireless IoT	1500	2400	29.6%	9.9%

Figure 3: Telecoms operator retail revenue from enterprises in 2018 and CAGR for 2018–2023 by enterprise size, UAE, 2018¹



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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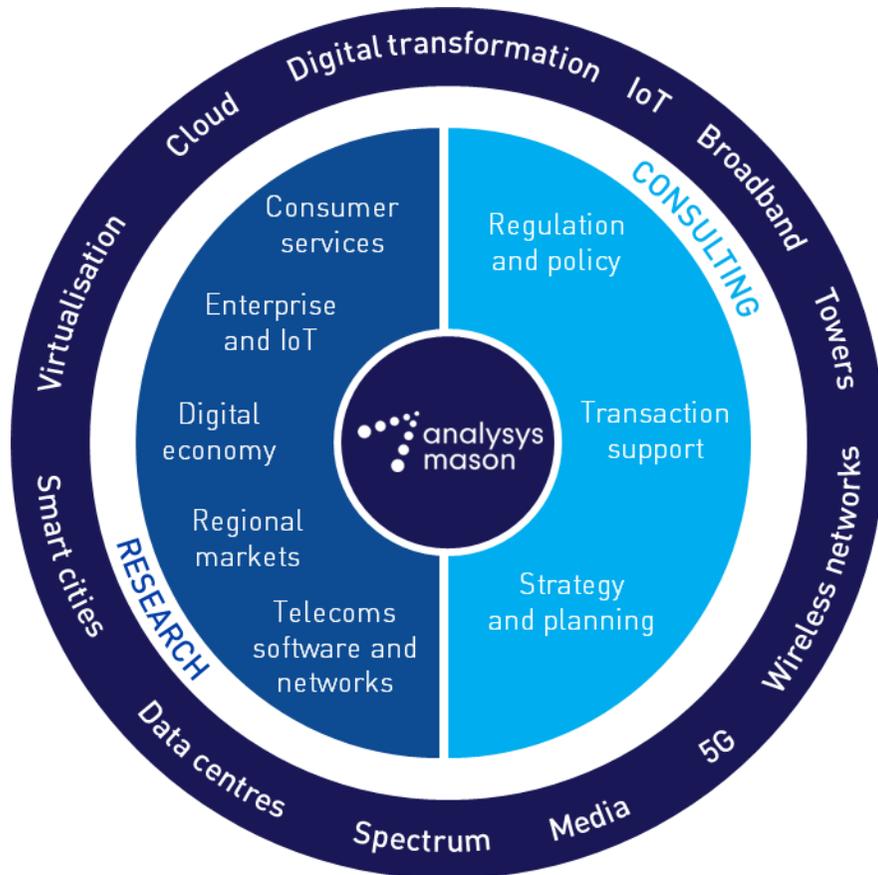
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