

September 2023



Analysys Mason DataHub: introduction to key features and content overview



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The DataHub, our database tool, enables clients to access our key data products from a single online portal

80+ countries, 8 regions, worldwide



'Telco' portal: around 3000 metrics in the actuals (300) and forecasts (2700) tabs



'Telco actuals' updated quarterly
'Telco forecasts' once a year



Actuals: around 600 operators, normalised and as-reported data (including financial KPIs for Groups)



'Telco forecasts' for core, IoT, business services, pay-TV metric sets and more



'SMB Technology Forecaster' portal: 120 000+ metrics on business spend on 130+ ICT categories



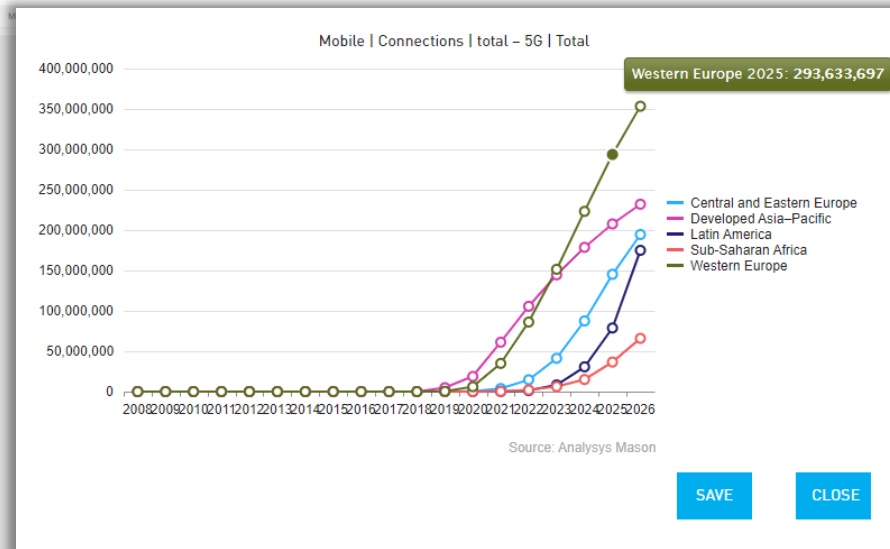
Key

TELCO Actuals

TELCO Forecasts

SMB Technology Forecaster

Network	Metric type	Metric	Segment	Info	Geography	Unit	Chart	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Mobile	Connections	total - 5G	Total		NA	(k)	ln	1	3,775	39,605	110,802	179,288	252,067	316,733	367,628	407,273	437,233
Mobile	Connections	total - 5G	Total		LATAM	(k)	ln	0	0	27	146	1,256	8,260	35,686	78,790	174,896	
Mobile	Connections	total - 5G	Total		WE	(k)	ln	0	357	6,075	34,895	86,128	151,451	223,162	293,634	353,368	
Mobile	Connections	total - 5G	Total		CEE	(k)	ln	0	54	520	3,773	14,648	41,200	87,506	145,210	194,467	
Mobile	Connections	total - 5G	Total		DVAP	(k)	ln	0	4,854	18,765	61,201	105,623	144,554	178,606	207,629	232,020	
Mobile	Connections	total - 5G	Total		EMAP	(k)	ln	0	10,488	321,597	737,022	958,156	1,261,762	1,594,250	1,967,726	2,305,432	
Mobile	Connections	total - 5G	Total		MENA	(k)	ln	0	249	1,661	6,902	23,627	46,196	79,534	121,947	168,943	223,167
Mobile	Connections	total - 5G	Total		SSA	(k)	ln	0	0	67	330	1,949	6,247	14,863	26,572	65,927	
Mobile	Connections	total - 5G share	Total		NA	%	ln	0.0%	0.9%	9.3%	25.2%	39.9%	55.0%	68.0%	77.9%	85.2%	90.5%
Mobile	Connections	total - 5G share	Total		LATAM	%	ln	0.0%	0.0%	0.0%	0.0%	0.2%	1.2%	4.3%	11.1%	24.5%	
Mobile	Connections	total - 5G share	Total		WE	%	ln	0.0%	0.1%	1.1%	6.5%	15.9%	27.8%	41.0%	54.1%	65.1%	
Mobile	Connections	total - 5G share	Total		CEE	%	ln	0.0%	0.0%	0.1%	0.7%	2.7%	7.7%	16.3%	27.0%	36.3%	
Mobile	Connections	total - 5G share	Total		DVAP	%	ln	0.0%	1.5%	6.0%	19.6%	33.7%	45.8%	56.4%	65.4%	73.1%	
Mobile	Connections	total - 5G share	Total		EMAP	%	ln	0.0%	0.3%	8.4%	19.0%	23.9%	30.7%	37.9%	45.8%	52.8%	
Mobile	Connections	total - 5G share	Total		MENA	%	ln	0.0%	0.1%	0.3%	1.3%	4.2%	8.0%	13.5%	20.3%	27.6%	35.8%



Export to Excel for further analysis

On-screen charts, easy comparisons

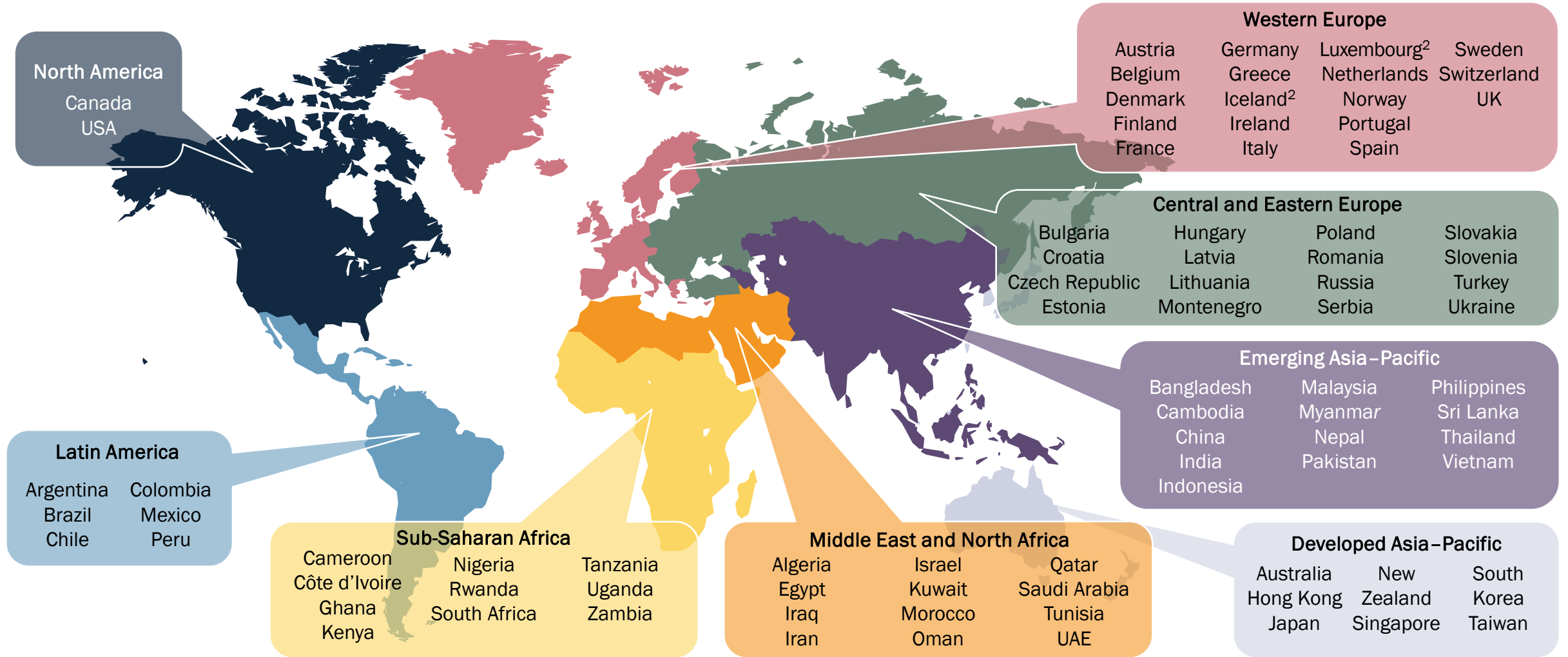
Save and re-load searches

On-screen currency conversion

On-screen definitions and update dates

Geographical coverage: more than 80 countries in 8 regions, regional totals and worldwide results

Geographical coverage of Analysys Mason DataHub, September 2023



¹ This shows all the countries/regions represented in the DataHub. Different datasets in each portal have different country coverage. This is articulated in the 'List of metrics', which can be downloaded from the 'About the DataHub' menu on the [DataHub](#) platform. ² Iceland and Luxembourg are primarily SMB Technology Forecaster (STF) countries, and a small set of historical data is available for Iceland in the 'Telco actuals' tab.

DataHub inputs come from a range of research programmes



Consumer Services

- Fixed Broadband Services
- Mobile Services
- Fixed-Mobile Convergence
- Smart Devices
- Future Comms
- Video, Gaming and Entertainment



Networks

- Next-Generation Wireless Networks
- Wireless Infrastructure Strategies
- Fibre Infrastructure Strategies
- Operator Investment Strategies
- Telecoms Strategy and Forecast
- Transport Network Strategies



Applications

- Network Automation and Orchestration
- Customer Engagement
- Monetisation Platforms
- Digital Experience
- Automated Assurance
- Service Design and Orchestration
- Telecoms Software Market Shares

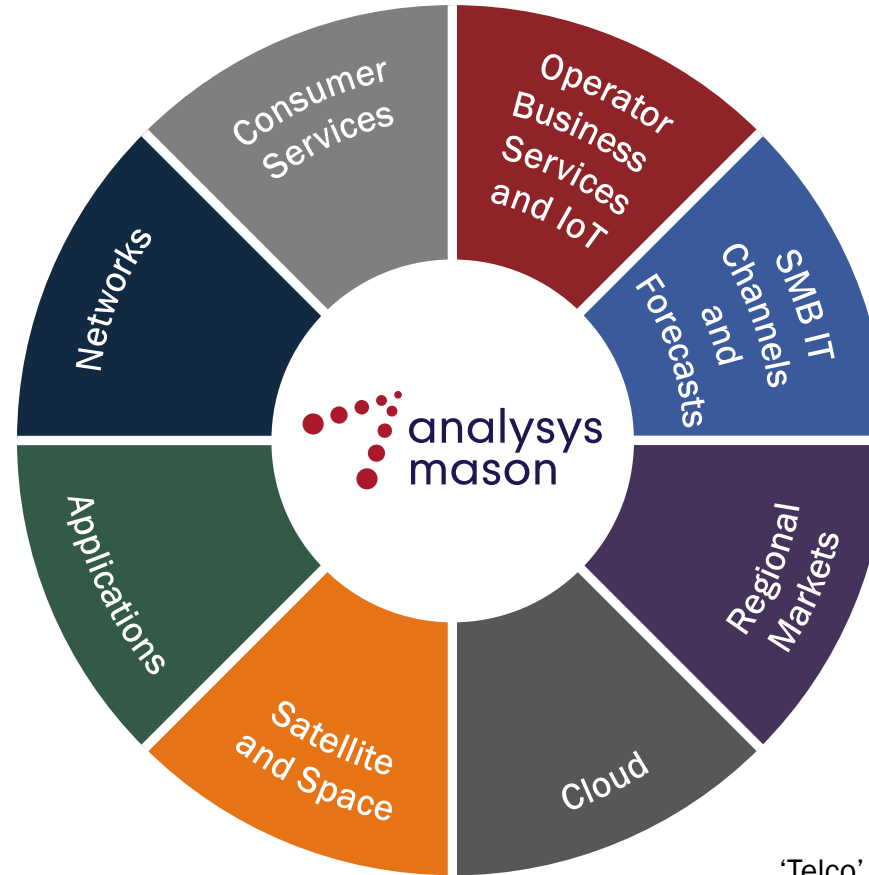


Satellite and Space

- Satellite Strategies for Telcos

Key

Coloured, shaded areas indicate those research programmes that have datasets in the DataHub.



Operator Business Services and IoT

- Enterprise Services
- SME Services
- IoT Services
- Private Networks
- Cyber Security



SMB IT Channels and Forecasts

- SMB Technology Forecaster



Regional Markets

- Global Telecoms Data and Financial KPIs
- Americas
- Asia-Pacific
- Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports



Cloud

- Cloud Infrastructure Strategies
- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking



DataHub

- Forecast data for 80 countries
- 'Telco' portal: ~2800 forecast and ~320 historical metrics
- 'SMB Technology Forecaster' portal: ~120 000 forecast metrics



The DataHub has two main sections (portals): ‘Telco’ and ‘SMB Technology forecaster’

1

TELCO

Telco

This portal has the following two tabs, which provide access to data that captures the activity of telecommunications operators in over 80 markets.

The ‘Telco forecasts’ tab contains coherent sets of data that run from 2008 to 5 or more years into the future. They are compiled annually at a fixed point in time and therefore may not contain the most recently available data.

The ‘Telco actuals’ tab contains historical data from 4Q 2003, with quarterly, half-yearly and operator data available for many metrics. The most recent data can be found in the quarterly and half-yearly results.

The screenshot displays the DataHub interface for the Telco portal. At the top, there are logos for 'analysys mason' and 'DataHub', along with a 'Research' label and a 'Log out' button. The main navigation bar features two tabs: 'SMB TECHNOLOGY FORECASTER' (labeled with a '2') and 'TELCO' (labeled with a '1'). The 'TELCO' tab is active and contains two sub-tabs: 'FORECASTS' and 'ACTUALS'. Below the navigation bar, there are three filter panels: 'GEOGRAPHY' with a search box 'Set locations...', 'FORECAST VIEWS' with a grid of checkboxes for categories like 'Everything', 'IoT forecasts', 'Pay-TV forecasts', 'Data traffic forecasts', 'Core forecasts', 'Business forecasts', 'Communications services', and 'FMC forecasts', and 'YEARS' with a search box 'Set years...'. The main content area is titled 'METRICS' and includes a 'Clear filters' button and a search box 'Free text: Enter freetext...'. Below this, there are four columns of filters: 'Network' (Mobile, Fixed, etc.), 'Metric type' (Connections, Users, etc.), 'Segment' (Total, Residential, etc.), and 'Service' (Totals, Voice, Data, etc.). At the bottom of the metrics section, it says 'Show metrics (2670 metrics found)' and 'Level: 5 (all metrics)'. There are also buttons for 'Save this search' and 'SEARCH'.

2

STF

SMB Technology Forecaster (new as of September 2023)

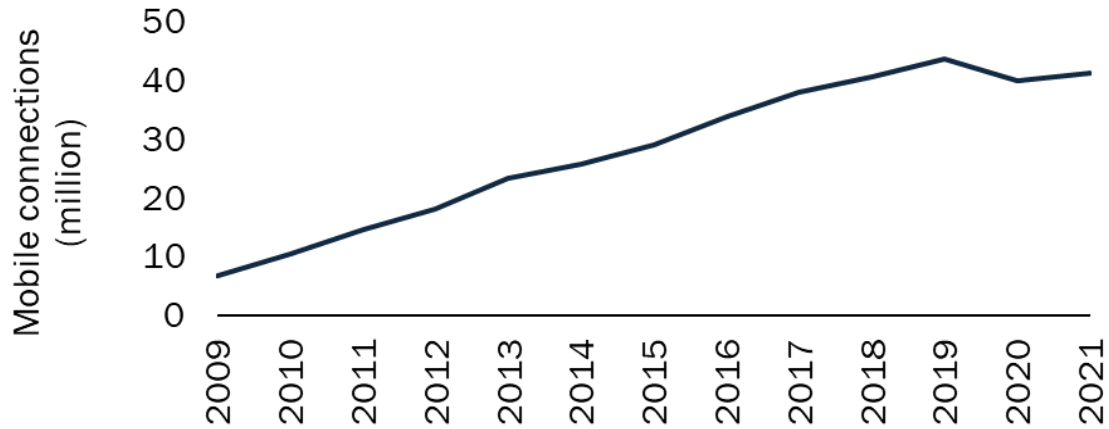
This portal contains forecasts of business spending on ICT in around 60 markets.

The data covers over 130 ICT categories, and spend is further split by business size, industry vertical and route to market.

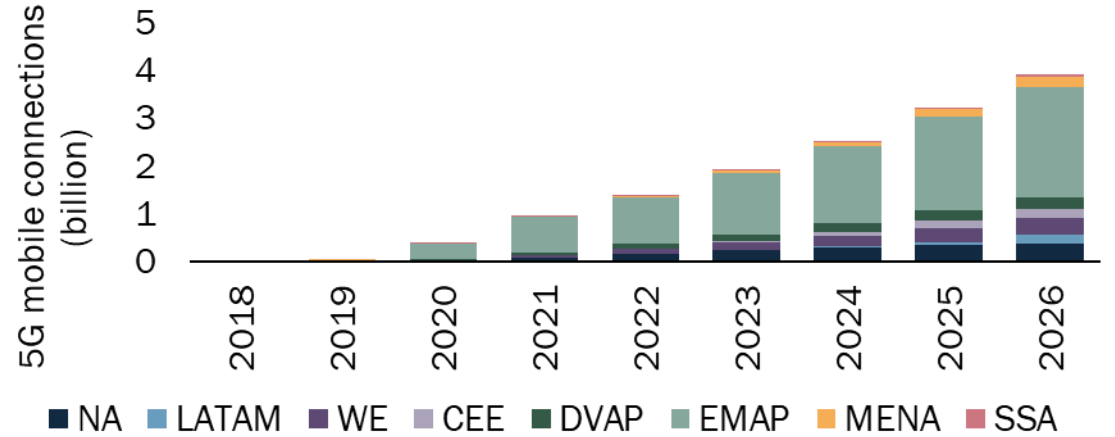
These forecasts are updated annually.

What kind of questions can DataHub's 'Telco' dataset address?

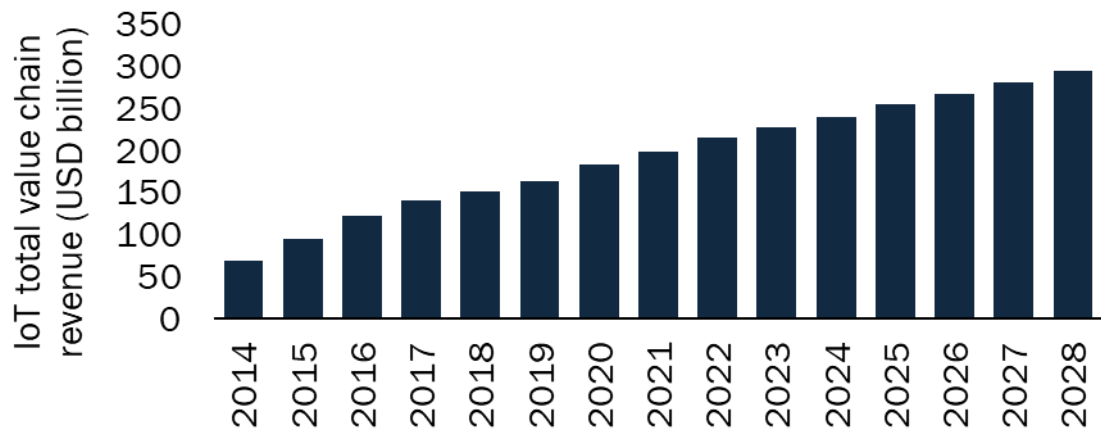
What was the impact of COVID-19 on telecoms revenue?



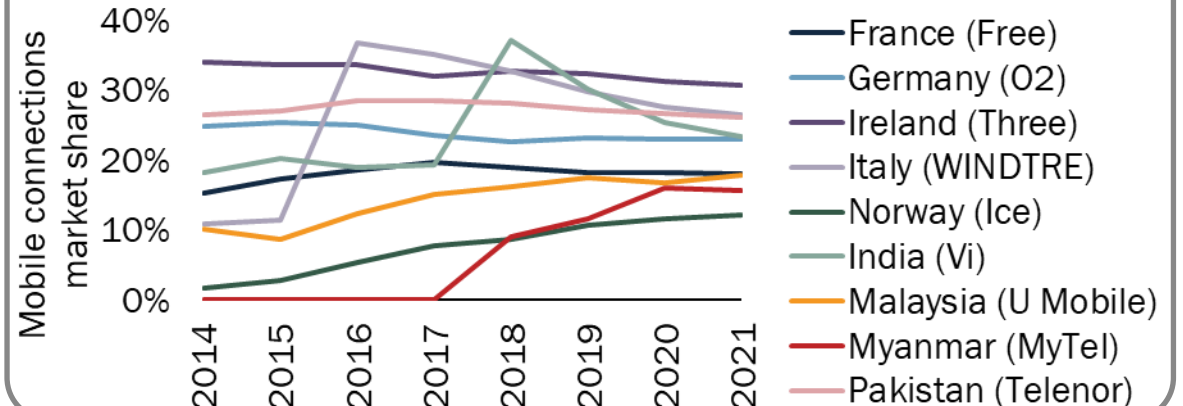
When and where will 5G be deployed?



How big will the IoT opportunity be?

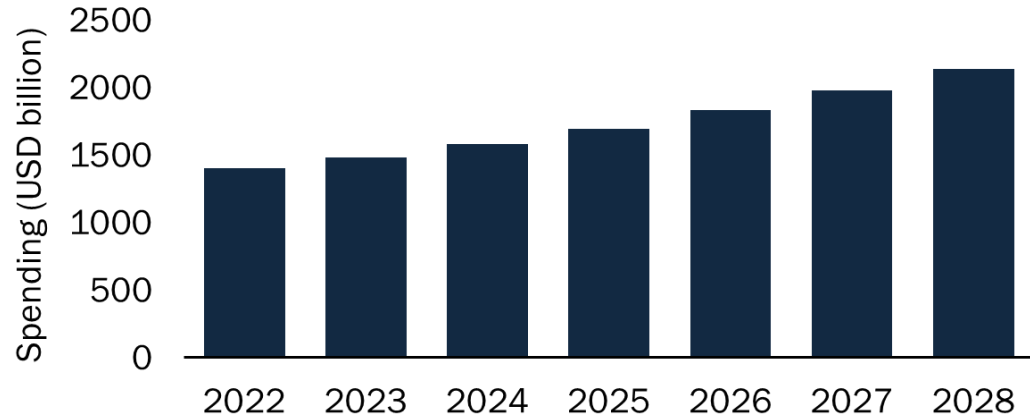


When do fourth-entrant mobile operators gain a sizeable market share?

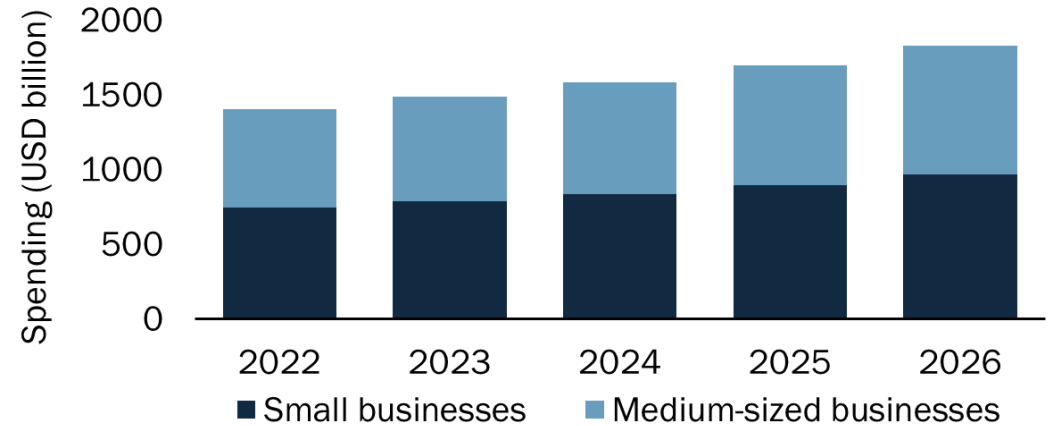


What kind of questions can the 'SMB Technology Forecaster' (STF) dataset address?

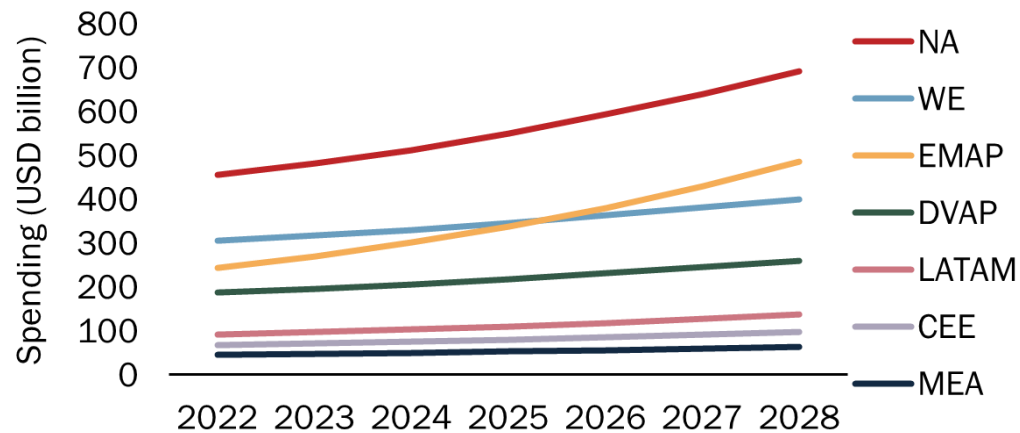
How are current events impacting SMBs' IT spending?



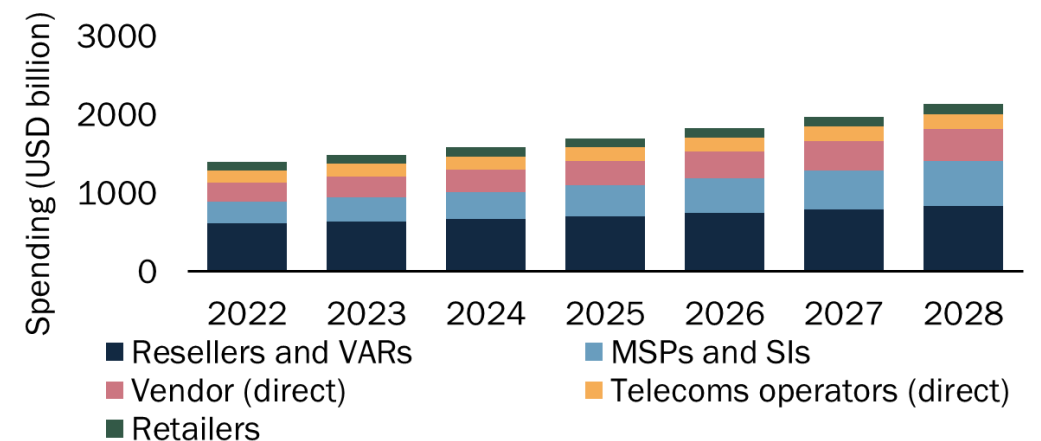
What are the top spending business segments?



What are the top target geographies?



What are the most preferred channels for IT purchases?



Key concepts: overview

The screenshot shows the DataHub interface with the following elements:

- Navigation:** 'SMB TECHNOLOGY FORECASTER' and 'TELCO FORECASTS ACTUALS' tabs.
- Geography and Operators:** Input fields for 'Set locations...' and 'Set operators...'.
- Metrics:** A large section with filters for Network, Metric type, Service, and Technology.
- Search:** A search bar with 'Free text: Enter freetext...' and a 'SEARCH' button.
- Menu (1):** A dropdown menu titled 'ABOUT THE DATAHUB' with options like 'Using the DataHub', 'Version log', and 'List of metrics'.
- Buttons (2):** 'NEW SEARCH' and 'LOAD A SEARCH' buttons.

1 About the DataHub

Important information about the DataHub and the data you can see..

- The 'new data' icon (i) shows if data has recently been refreshed.
- 'My access rights' gives details of your current subscription.
- The '**Version log**' shows the latest update information, including the latest version of Telco forecasts and actuals.

Latest 'Telco' core forecast versions	Publication date	Based on historical data up to:	Status	Latest 'Telco' actuals data	Publication date	Based on historical data up to:	Status
Worldwide	07 Sep 2023	1Q 2022	Refreshed	Financial KPIs (all regions)	07 Sep 2023	2Q 2023	NEW
Developed Asia-Pacific	07 Sep 2023	1Q 2023	NEW	Developed Asia-Pacific	07 Sep 2023	1Q 2023	Refreshed
North America	07 Sep 2023	1Q 2022	Refreshed	Sub-Saharan Africa	07 Sep 2023	1Q 2023	Refreshed
Latin America	07 Sep 2023	3Q 2022	Refreshed	North America	31 Jul 2023	1Q 2023	
Emerging Asia-Pacific	07 Sep 2023	2Q 2022	Refreshed	Latin America	31 Jul 2023	1Q 2023	
Middle East and North Africa	07 Sep 2023	4Q 2022	Refreshed	Emerging Asia-Pacific	31 Jul 2023	1Q 2023	
Sub-Saharan Africa	07 Sep 2023	3Q 2022	Refreshed	Middle East and North Africa	10 Jul 2023	1Q 2023	
Central and Eastern Europe	22 Jun 2023	2Q 2022		Central and Eastern Europe	30 Jun 2023	1Q 2023	
Western Europe	21 Jun 2023	2Q 2022		Western Europe	21 Jun 2023	1Q 2023	

*Telco' core and topic forecasts have different update cycles. These publication dates reflect the latest changes to 'Telco' core forecasts. Please refer to the List of metrics for full details of update versions. *Refreshed" indicates a minor change to an existing dataset, whilst "NEW" indicates a full new version.

- The '**List of metrics**' provides a full inventory of all the data available in the DataHub (including datasets not currently in your subscription).
- Information on how to use the DataHub, including 'Getting Started', a video demonstration, as well as the downloadable 'User Guide' and information pack 'What is the DataHub?'.

2 Load a search

Reuse a saved search (countries, operators, metrics, years).

Key concepts: filters – an example from the ‘Telco’ portal

The screenshot shows the 'Telco' portal interface with several filter sections:

- Network:** Mobile (checked), Fixed, Fixed + Mobile, Pay TV, Fixed + Pay TV, Fixed + Mobile + Pay TV, Wireless, Fixed + Wireless, Network independent, All.
- Metric type:** Connections (checked), Users, Penetration, Service + equipment revenue, Service revenue, Retail revenue, Wholesale revenue, Equipment revenue, ARPU, ASPU, Traffic, Socioeconomic.
- Segment:** Total (checked), Residential, Business, Business - SME, Business - micro, Business - small, Business - medium, Business - large.
- Service:** Totals, Voice, Data, Data - messaging, Data - access/content, Data - broadband, Data - dedicated connx, Data - IoT, ICT, Pay TV, FMC.

Callout 1 (1) points to question mark icons in the filter headers. Callout 2 (2) points to a 'Metrics' list table.

Network	Metric type	Metric
Mobile	Connections	total - Including IoT
Mobile	Connections	total
Mobile	Connections	total - prepaid
Mobile	Connections	total - contract
Mobile	Connections	total - prepaid share
Mobile	Connections	total - 2G

1 On-screen help gives definitions and details of our taxonomy.

2 Dynamic filtering: find the metrics that you need by filtering on key identifiers.

Key concepts: metrics selector – an example from the ‘Telco’ portal

The screenshot displays the 'Telco' portal metrics selector interface. The main table shows 36 metrics found, with the following columns: Network, Metric type, Metric, Segment, Info, and Count. The metrics listed are:

Network	Metric type	Metric	Segment	Info	Count
<input type="checkbox"/> Network					
<input type="checkbox"/> Mobile	Connections	total – including IoT	Total	?	93
<input type="checkbox"/> Mobile	Connections	total	Total	?	93
<input type="checkbox"/> Mobile	Connections	total – prepaid	Total	?	93
<input type="checkbox"/> Mobile	Connections	total – contract	Total	?	93
<input type="checkbox"/> Mobile	Connections	total – prepaid share	Total	?	93
<input type="checkbox"/> Mobile	Connections	total – 2G	Total	?	93

At the bottom of the interface, there is a 'Save this search' button and a 'SEARCH' button.

- 1 Tiered metric names make our taxonomy clear.
- 2 A country count makes it easy to see how much data is available.
- 3 The ‘Save this search’ function allows you to easily repeat regular searches.

Key concepts: selecting geographies – an example from the ‘Telco’ portal

1 Tick the boxes to select the appropriate countries and/or regions.

2 Click on the region name to select all countries in the region, plus the regional total.

3 Quick controls allow you to select all, clear your selection and select regional totals only.

4 Hover over the regional total text to see a complete list of countries included.

5 The ‘Apply filters’ button stores your selection and returns you to the main portal page.

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4 Hover over the regional total text to see a complete list of countries included.

5 The ‘Apply filters’ button stores your selection and returns you to the main portal page.

- Notes**
- If no geographies are chosen, your search will return results for all countries and regions that are available.
 - Countries/regions not included in your subscription will be greyed out.

Key concepts: selecting a time period (optional) – an example from the ‘Telco’ portal

The screenshot shows the DataHub TELCO portal interface. At the top, there's a navigation bar with 'SMB TECHNOLOGY FORECASTER', 'FORECASTS', and 'ACTUALS' tabs. Below this are filter sections: 'GEOGRAPHY' (Set locations...), 'FORECAST VIEWS' (Everything, IoT forecasts, Pay-TV forecasts, Data traffic forecasts, Core forecasts, Business forecasts, Communications services, FMC forecasts), and 'YEARS' (Set years...). The 'METRICS' section is expanded, showing categories like Network, Metric type, Segment, and Service with various checkboxes. A search bar and 'Save this search' button are at the bottom.

Note
If no years are chosen, your search will return results for all years that are available.

SELECT YEARS TO FILTER YOUR RESULTS BY:

Quick select [2018-2027](#) [2022-2027](#) [2022-2031](#) [Select all](#) [Clear](#)

<input type="checkbox"/> 2003	<input type="checkbox"/> 2011	<input type="checkbox"/> 2019	<input type="checkbox"/> 2027
<input type="checkbox"/> 2004	<input type="checkbox"/> 2012	<input type="checkbox"/> 2020	<input type="checkbox"/> 2028
<input type="checkbox"/> 2005	<input type="checkbox"/> 2013	<input type="checkbox"/> 2021	<input type="checkbox"/> 2029
<input type="checkbox"/> 2006	<input type="checkbox"/> 2014	<input type="checkbox"/> 2022	<input type="checkbox"/> 2030
<input type="checkbox"/> 2007	<input type="checkbox"/> 2015	<input type="checkbox"/> 2023	<input type="checkbox"/> 2031
<input type="checkbox"/> 2008	<input type="checkbox"/> 2016	<input type="checkbox"/> 2024	<input type="checkbox"/> 2032
<input type="checkbox"/> 2009	<input type="checkbox"/> 2017	<input type="checkbox"/> 2025	<input type="checkbox"/> 2033
<input type="checkbox"/> 2010	<input type="checkbox"/> 2018	<input type="checkbox"/> 2026	<input type="checkbox"/> 2034

For data prior to 2008 please refer to the Actuals portal.

CANCEL [▶ APPLY FILTERS](#)

Key concepts: 'Telco forecast' views

The screenshot shows the DataHub interface for 'Telco forecast' views. At the top, there are tabs for 'SMB TECHNOLOGY FORECASTER' and 'TELCO FORECASTS ACTUALS'. Below this are three main filter sections: 'GEOGRAPHY' (19 selected: Belgium, France, Germany, ...), 'FORECAST VIEWS' (with a list of views like 'Everything', 'IoT forecasts', etc.), and 'YEARS' (Set years...). Below these is a 'METRICS' section with a 'Using metric set for FMC forecasts' banner and a 'remove' button. The metrics are organized into columns: Network, Metric type, Segment, and Service. A table at the bottom shows the resulting metrics, with columns for Network, Metric type, Metric, Segment, Info, and Countries.

Network	Metric type	Metric	Segment	Info	Countries
<input type="checkbox"/> Fixed + Mobile + Pay TV	Users	Multiplay accounts – total	Total	?	19
<input type="checkbox"/> Fixed + Mobile + Pay TV	Users	Multiplay accounts – mobile + fixed broadband + pay TV	Total	?	19
<input type="checkbox"/> Fixed + Mobile + Pay TV	Users	Multiplay accounts – mobile + fixed broadband only	Total	?	19
<input type="checkbox"/> Fixed + Mobile + Pay TV	Users	Multiplay accounts – fixed broadband + pay TV only	Total	?	19
<input type="checkbox"/> Fixed + Mobile + Pay TV	Users	Multiplay accounts – share of fixed broadband connections	Total	?	19

- 1 Describes the subset of 'Telco forecast' data that is currently being viewed based on the selection from the 'forecast views' box.
- 2 Remove this view by clicking 'remove'.
- 3 Only the relevant metrics and geographies are shown; filters are rearranged to show those relevant to each data set.

Key concepts: forecast results – an example from the ‘Telco’ portal

analysis mason Research Log out DataHub

SMB TECHNOLOGY FORECASTER TELCO FORECASTS ACTUALS

Expand search Save this search SEARCH

348 RESULTS All countries, 2008-2030, 36 metrics

Chart from selection Export selected Export all Key: Historical | Forecast

Network	Metric type	Metric	Segment	Geography	Unit	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
<input type="checkbox"/> Mobile	Connections	total – including IoT	Total	Canada	(k)	36,128	38,116	40,502	43,960	48,121	53,135	59,055	65,737	72,742	79,969
<input type="checkbox"/> Mobile	Connections	total – including IoT	Total	USA	(k)	448,059	477,735	509,068	555,531	610,440	671,009	732,949	795,178	857,887	920,265
<input type="checkbox"/> Mobile	Connections	total – including IoT	Total	NA	(k)	484,187	515,851	549,570	599,491	658,561	724,144	792,005	860,914	930,629	1,000,234
<input type="checkbox"/> Mobile	Connections	total – including IoT	Total	Argentina	(k)	59,118	57,516	55,649	57,678	59,351	60,854	62,451	64,203	66,185	
<input type="checkbox"/> Mobile	Connections	total – including IoT	Total	Brazil	(k)	229,202	226,674	234,067	255,593	268,305	277,660	288,238	300,138	313,264	
<input type="checkbox"/> Mobile	Connections	total – including IoT	Total	Chile	(k)	28,276	28,374	28,311	29,646	30,317	31,246	32,308	33,479	34,758	
<input type="checkbox"/> Mobile	Connections	total – including IoT	Total	Colombia	(k)	61,614	64,062	65,195	70,347	73,241	75,446	77,935	80,596	83,391	

- 1 On-screen charting for easy comparisons.
- 2 Export to Excel for further analysis.
- 3 On-screen help provides definitions and update dates.
- 4 View a chart for a single row.

- 5 Instantly convert between currencies (currency conversion is not available in the ‘SMB Technology Forecaster’ portal, where all results are in USD).
- 6 Choose between rounded and unrounded data.
- 7 Colours distinguish between historical data and forecasts.

Key concepts: 'Telco actuals': operator selector

- 1 Click on the 'Operators' box to filter by operator.
- 2 Filter operators by geography.
- 3 Filter by network type: fixed, mobile and/or fixed + mobile.
- 4 Filter by operator type (for example, incumbent, fourth entrant, altnet or cable operator).
- 5 Free-text search helps you to find all instances of a given operator.
- 6 Free-text searches for host mobile network operator (MNO) and Group entities.

SELECT OPERATORS TO FILTER YOUR RESULTS 1206 operators found

Refine list by:

- 2 Geography ?
- 3 Network ?
- 4 Operator Type ?

5 Filter on Operator: x

Filter on Country Filter on Network Filter on Type

<input type="checkbox"/>	Operator	Country	Network	Type	6 Filter on MNO: <input type="text" value="Enter MNO"/> x	Filter on Group: <input type="text" value="Enter Group"/> x
<input type="checkbox"/>	VEON (Djezzy)	Algeria	Mobile	second entrant	VEON (Djezzy)	VEON
<input type="checkbox"/>	Algérie Télécom (Mobilis)	Algeria	Mobile	first entrant	Algérie Télécom (Mobilis)	n/a
<input type="checkbox"/>	Ooredoo	Algeria	Mobile	third entrant	Ooredoo	Ooredoo

Key concepts: 'Telco actuals' results

The screenshot shows the DataHub interface for 'Telco actuals' results. The page includes a navigation bar with 'SMB TECHNOLOGY FORECASTER' and 'TELCO FORECASTS ACTUALS'. The main content area displays a table of data with columns for Network, Metric type, Metric, Segment, Geography, Operator, Unit, Chart, and years from 2013 to 2021. The table is filtered to show 'Mobile' connections for 'total - including IoT' across various countries. The interface also features options for 'Country & operator data', 'Years', 'USD current', and 'Rounded'. Callouts 1-8 highlight specific features: 1. On-screen charting, 2. Export to Excel, 3. On-screen help, 4. Select operator data, 5. Select annual data, 6. Currency conversion, 7. Choose between rounded and unrounded data, 8. View a chart for a single row.

Network	Metric type	Metric	Segment	Geography	Operator	Unit	Chart	2013	2014	2015	2016	2017	2018	2019	2020	2021
Mobile	Connections	total - including IoT	Total	Canada	Total market	(k)		28,973	29,855	31,019	32,598	34,049	36,128	38,116	40,502	43,960
Mobile	Connections	total - including IoT	Total	USA	Total market	(k)		342,205	366,189	390,832	410,064	423,574	452,169	482,976	515,369	553,781
Mobile	Connections	total - including IoT	Total	Argentina	Total market	(k)		19,596	61,837	62,961	63,583	61,017	59,118	57,516	55,649	59,748
Mobile	Connections	total - including IoT	Total	Brazil	Total market	(k)		280,100	280,729	257,814	244,069	236,489	229,202	226,674	234,067	254,711
Mobile	Connections	total - including IoT	Total	Chile	Total market	(k)		27,096	26,856	26,724	26,795	27,550	28,276	28,374	28,311	30,350
Mobile	Connections	total - including IoT	Total	Colombia	Total market	(k)		49,542	54,190	55,340	56,170	58,920	61,614	64,062	65,195	71,918

- 1 On-screen charting for easy comparisons.
- 2 Export to Excel for further analysis.
- 3 On-screen help provides definitions and update dates.
- 4 Select operator data, country data or both.
- 5 Select annual data, quarterly data, half-yearly data or all data.
- 6 Instantly convert between currencies (currency conversion is not available in the 'SMB Technology Forecaster' portal, where all results are in USD).
- 7 Choose between rounded and unrounded data.
- 8 View a chart for a single row.

Direct links from report landing pages

Emerging Asia-Pacific telecoms market: trends and forecasts 2021-2026

01 February 2021 | [Research](#)
[Stefano Porto Bonacci](#)

Forecast report | PPTX and PDF (72 slides); Excel | [Asia-Pacific](#)

"There are sizeable opportunities to monetise the demand for mobile and fixed data connectivity in both high- and low-income countries in EMAP."



Revenue in emerging Asia-Pacific (EMAP), excluding China, will increase at a CAGR of 4.6% between 2021 and 2026, driven by FTTP take-up, mobile data user base growth and the migration of customers towards top-tier mobile plans (using 5G in the wealthiest countries). China's revenue growth will be slower because of market saturation and competition.

In this report, we examine key trends and drivers, and provide comprehensive telecoms market forecasts for the region and for 13 individually modelled countries.



Click below to take you to the latest dataset if you are logged in and it is part of your subscription. The DataHub interface will only show you the data to which you are subscribed.

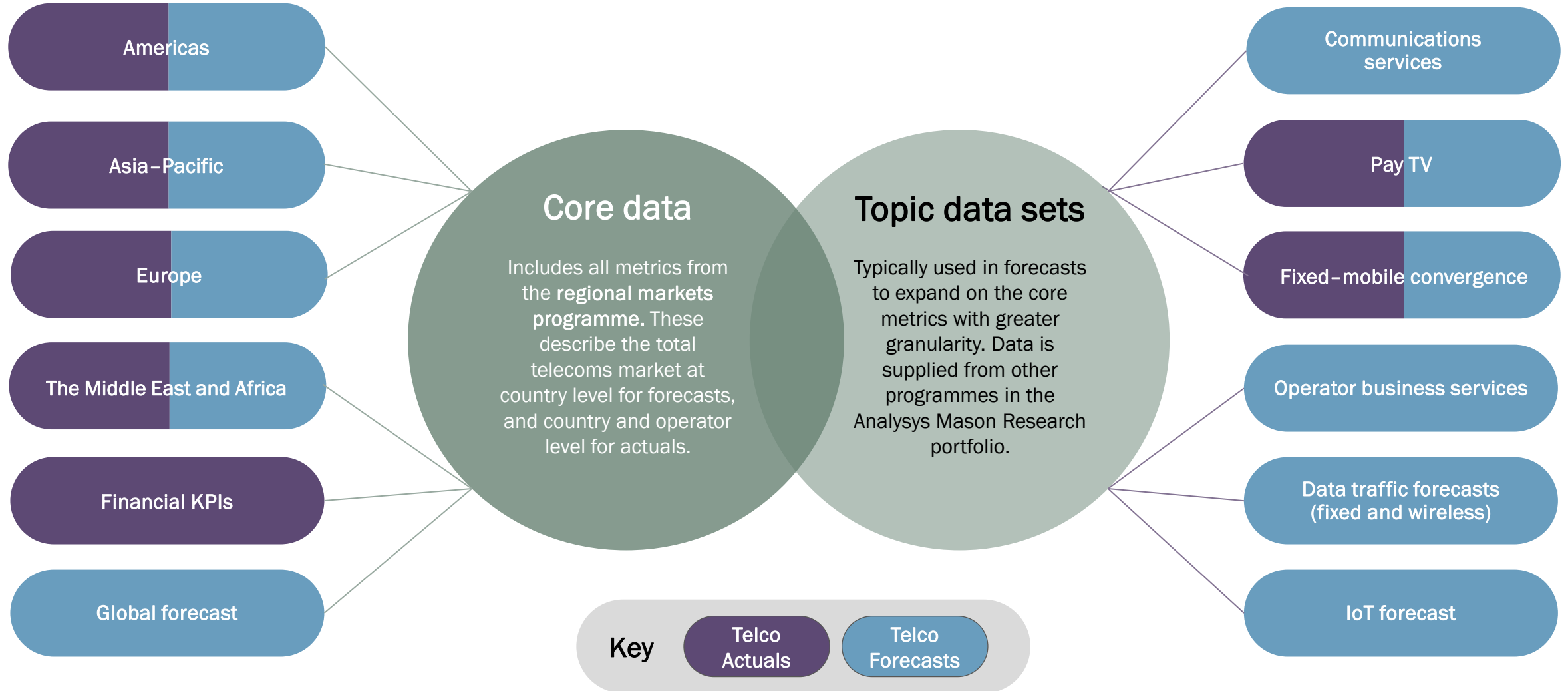
LAUNCH DATAHUB

Logged-in users that click on this link will go **directly to the DataHub**. The countries/regions and metrics that are associated with the report will be **pre-selected**, but you will be able to refine your search further before seeing the data.

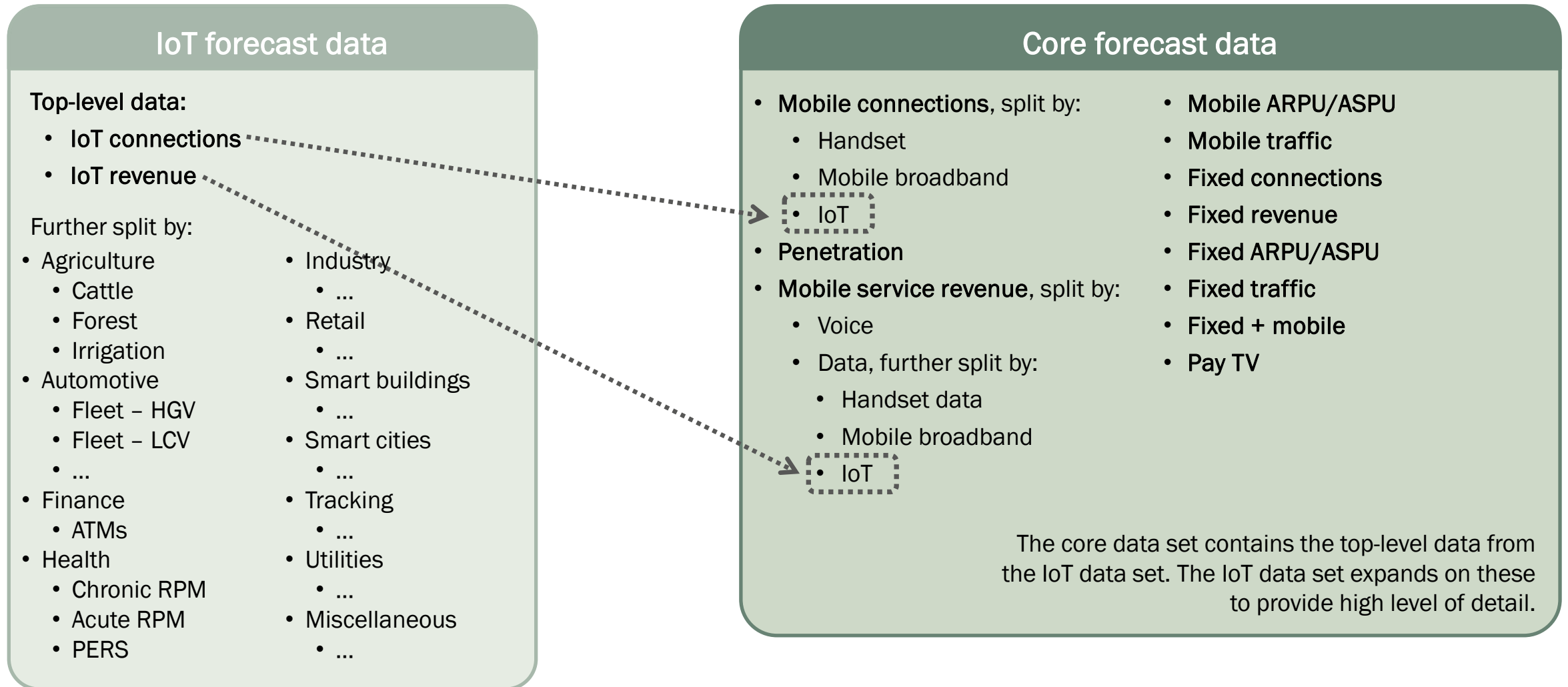
The screenshot shows the DataHub interface with the following elements:

- Navigation:** SMB TECHNOLOGY FORECASTER, TELCO FORECASTS, ACTUALS, ABOUT THE DATAHUB, NEW SEARCH, LOAD A SEARCH.
- GEOGRAPHY:** 15 selected: EMAP,Regional total excl. China,Bangladesh, ...
- FORECAST VIEWS:**
 - Everything, IoT forecasts, Pay-TV forecasts, Data traffic forecasts
 - Core forecasts, Business forecasts, Communications services, FMC forecasts
- YEARS:** Set years...
- METRICS:** Clear filters. A pink box highlights "Using metric set for Core forecasts" with a "remove" button.
- Filter Categories:**
 - Network:** Mobile, Fixed, Fixed + Mobile, Pay TV, Fixed + Pay TV, Fixed + Mobile + Pay TV, Wireless, Fixed + Wireless, Network independent, All.
 - Metric type:** Connections, Users, Penetration, Service + equipment revenue, Service revenue, Retail revenue.
 - Segment:** Wholesale revenue, Equipment revenue, ARPU, ASPU, Traffic, Socioeconomic.
 - Service:** Totals, Voice, Data, Data - messaging, Data - access/content, Data - broadband, Residential, Business, Business - SME, Business - micro, Business - small, Business - medium, Business - large, Data - dedicated connx, Data - IoT, ICT, Pay TV, FMC.
- Bottom:** Save this search, SEARCH button.

The Analysys Mason DataHub 'Telco' portal contains core data and extended topic data sets



The top-level data in the topic data sets feeds into the core forecast data

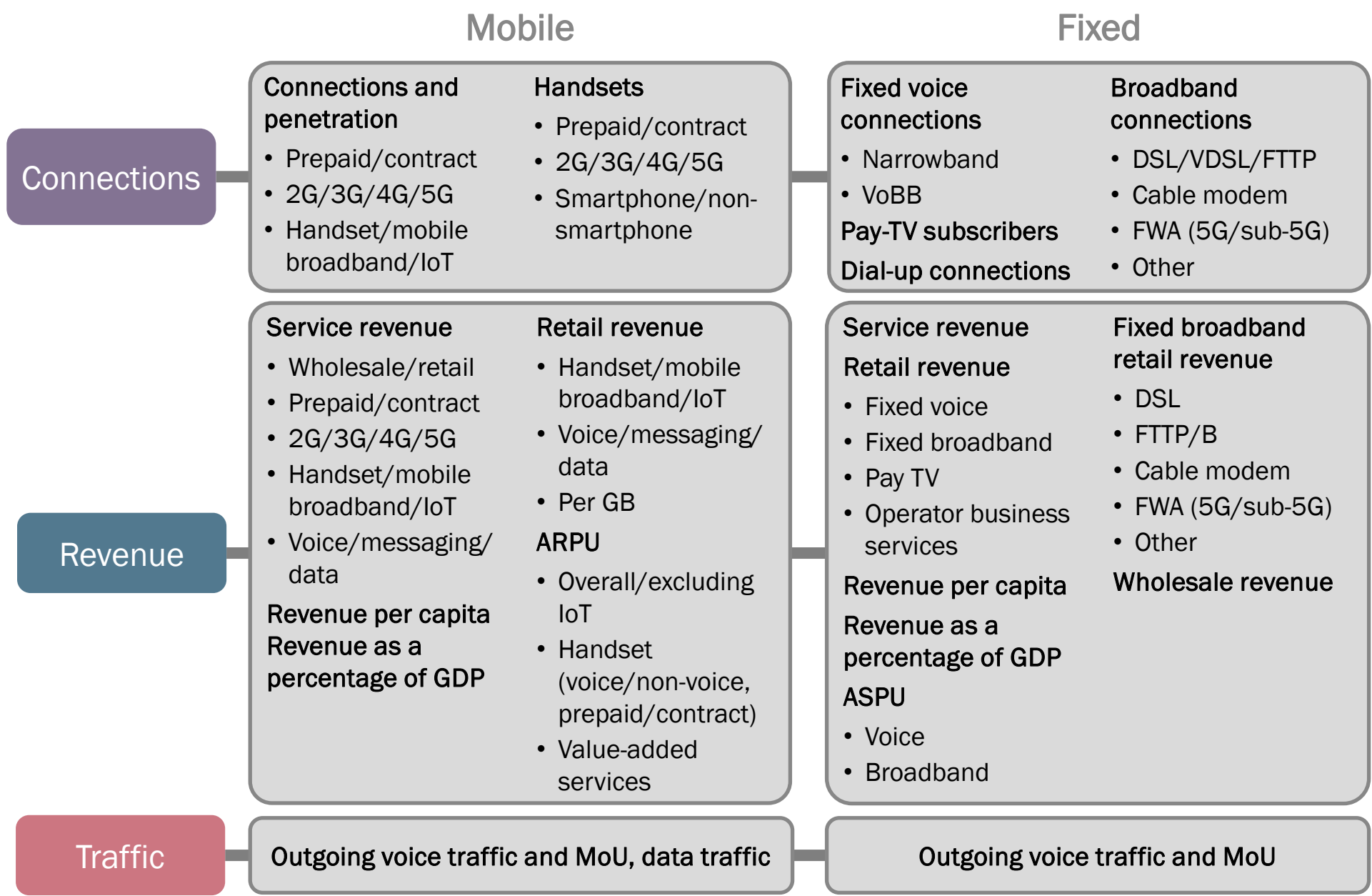


All core data metrics are standardised to enable valid comparisons

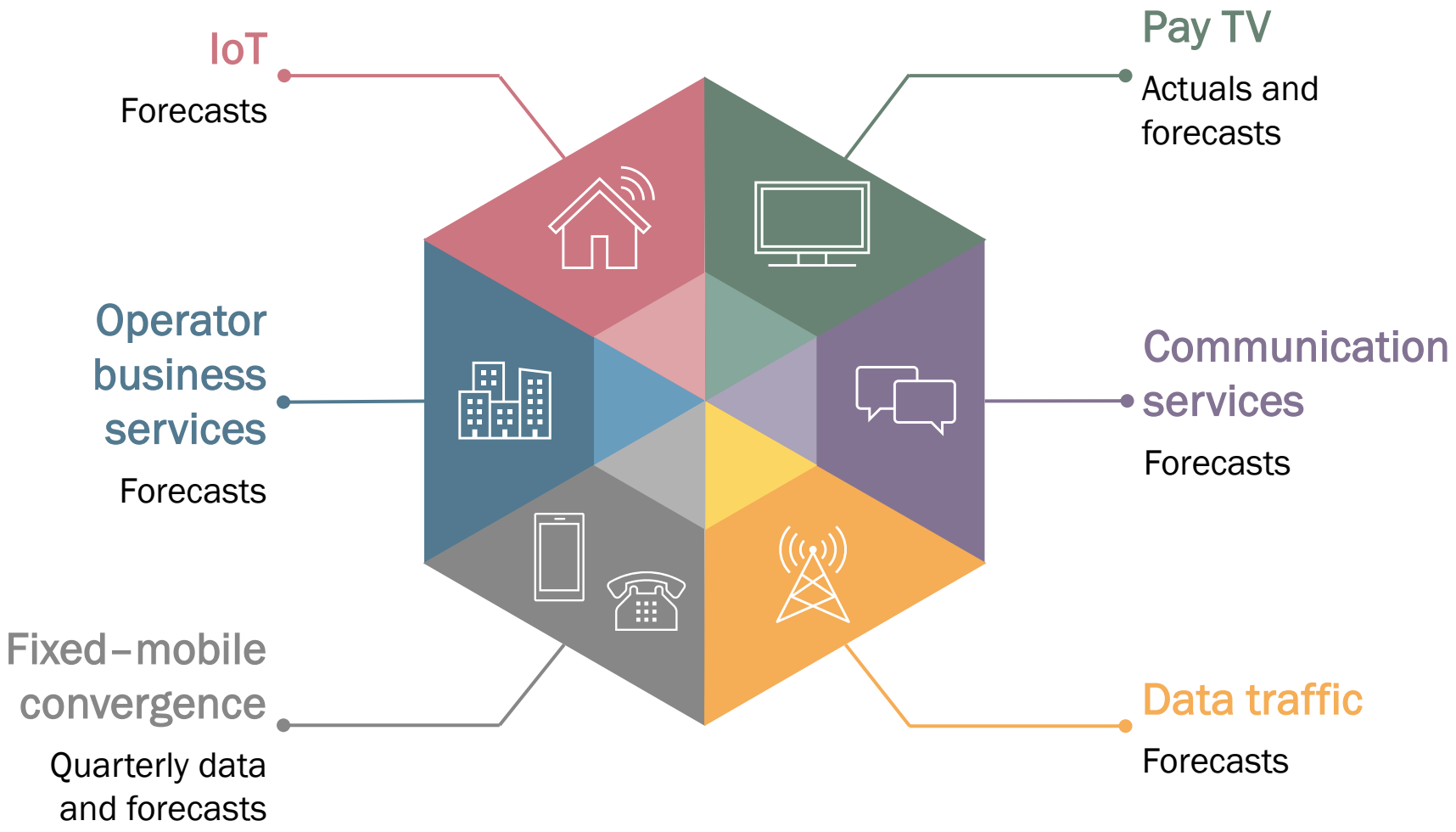
	TELCO actuals	TELCO forecasts
Metrics, timeframes and geographies	<ul style="list-style-type: none"> • Around 200 metrics (plus 80+ more for Europe) • Annual data: 2003–2022 • Quarterly data: 4Q 2003–1Q 2023 • 80+ countries, around 600 operators 	<ul style="list-style-type: none"> • Over 200 metrics (plus around 150 more for Europe) • Annual data: 2008–2028 • 80+ countries, 8 regions, worldwide totals
Country data: Values	<ul style="list-style-type: none"> • Revenue • Socioeconomic data • Connections • Traffic 	<ul style="list-style-type: none"> • Revenue • Socioeconomic data • Connections • Traffic
Comparative metrics	<ul style="list-style-type: none"> • ARPU • Revenue per minute, MB or capita and as a share of GDP • Technology/device penetration • Traffic per connection 	<ul style="list-style-type: none"> • ARPU • Revenue per minute, MB or capita and as a share of GDP • Technology/device penetration • Traffic per connection
Operator data: Values	<ul style="list-style-type: none"> • Revenue • Churn • Connections • Traffic • Financial KPIs 	None
Comparative metrics	<ul style="list-style-type: none"> • ARPU • Revenue market share • Prepaid connections share • Connections market share • Traffic per connection • Traffic market share • EBITDA margin • Capex as a share of revenue 	None

Key to text colours: Revenue Socioeconomic data Connections Traffic Financial KPIs

Our core data sets include over 200 metrics, with extra detail for Europe



Topic data sets give a more-granular analysis of key development subjects



We will add more topic data sets in the future, including forecasts for FTTx capex, smartphones and tablets

IoT forecasts

GEOGRAPHY

- 82 individual countries
- 8 regions
- Worldwide total

METRIC TYPES

Around 1400 metrics:

- Connections
- Retail revenue by technology/application
- Retail revenue by value chain element/application
- ARPC

OTHER FILTERS

Technology:

- 2G
- 3G/4G
- 5G
- NB-IoT
- LTE-M
- Other LPWA (includes Sigfox and LoRa)
- Fixed (selected applications with a dedicated fixed connection)

Vertical/application:

- Agriculture
- Automotive
- Finance
- Health
- Industry
- Retail
- Smart buildings
- Smart cities
- IoT tracking
- Utilities
- Miscellaneous

Operator business services forecasts

GEOGRAPHY

Regional and worldwide totals plus 54 individual countries:

- WE (16)
- CEE (9)
- DVAP (7)
- EMAP (7)
- MENA (7)
- SSA (3)
- NA (2)
- LATAM (3)

METRIC TYPES

Over 700 metrics:

- Operator revenue
- ICT services revenue addressable by operators
- Connections/users
- ASPU
- Employees, enterprises and business sites

OTHER FILTERS

Business size:

- Micro (0–9 employees)
- Small (10–99 employees)
- Medium (100–249 employees)
- Large (250+ employees)

Fixed services:

- Narrowband voice
- VoBB
- ADSL/SDSL, vDSL, FTTP/B, cable, FWA, other
- Dedicated connections, by speed

Mobile services:

- Voice
- Messaging
- Handset data
- Mobile broadband
- IoT connectivity

Other business services:

- Unified communications and hosted voice
- Security
- Co-location and hosting
- Software-as-a-service
- Infrastructure-as-a-service and platform-as-a-service
- Enterprise mobility
- Desktop management

Pay-TV actuals and forecasts

Forecasts

GEOGRAPHY

Regional and worldwide totals plus 54 individual countries:

- WE (16)
- CEE (16)
- DVAP (4)
- EMAP (8)
- MENA (5)
- SSA (1)
- NA (2)
- LATAM (2)

METRIC TYPES

100+ metrics:

- Connections
- Users
- Penetration
- Retail revenue
- ASPU

OTHER FILTERS

Service platform:

- Total traditional
- CATV
- CATV – analogue
- CATV – digital
- IPTV
- Satellite
- Pay DTT
- Operator OTT

Provider type:

- Operator
- OTT/non operator

Actuals

54 individual countries:

- WE (16)
- CEE (16)
- DVAP (4)
- EMAP (8)
- MENA (5)
- SSA (1)
- NA (2)
- LATAM (2)

30+ metrics:

- Connections
- Market share of connections
- Penetration
- Retail revenue
- Market share of retail revenue

Service platform:

- Total traditional
- CATV
- CATV – analogue
- CATV – digital
- IPTV
- Satellite
- Pay DTT
- Operator OTT

Provider type:

- Operator

Communication services forecasts

GEOGRAPHY

Regional and worldwide totals plus 63 individual countries:

- WE (16)
- CEE (16)
- DVAP (7)
- EMAP (10)
- MENA (5)
- SSA (4)
- NA (2)
- LATAM (3)

METRIC TYPES

Around 130 metrics:

- Connections
- Users
- Revenue
- ASPU
- Traffic

OTHER FILTERS

Comms service type:

- Voice
- Circuit switch
- VoIP
- VoLTE
- Wi-Fi calling
- Messaging P2P/A2P
- Messaging – SMS
- Messaging – IP

Provider type:

- Operator
- OTT/non operator

Device:

- Handset
- Smartphone
- Tablet
- PC/laptop

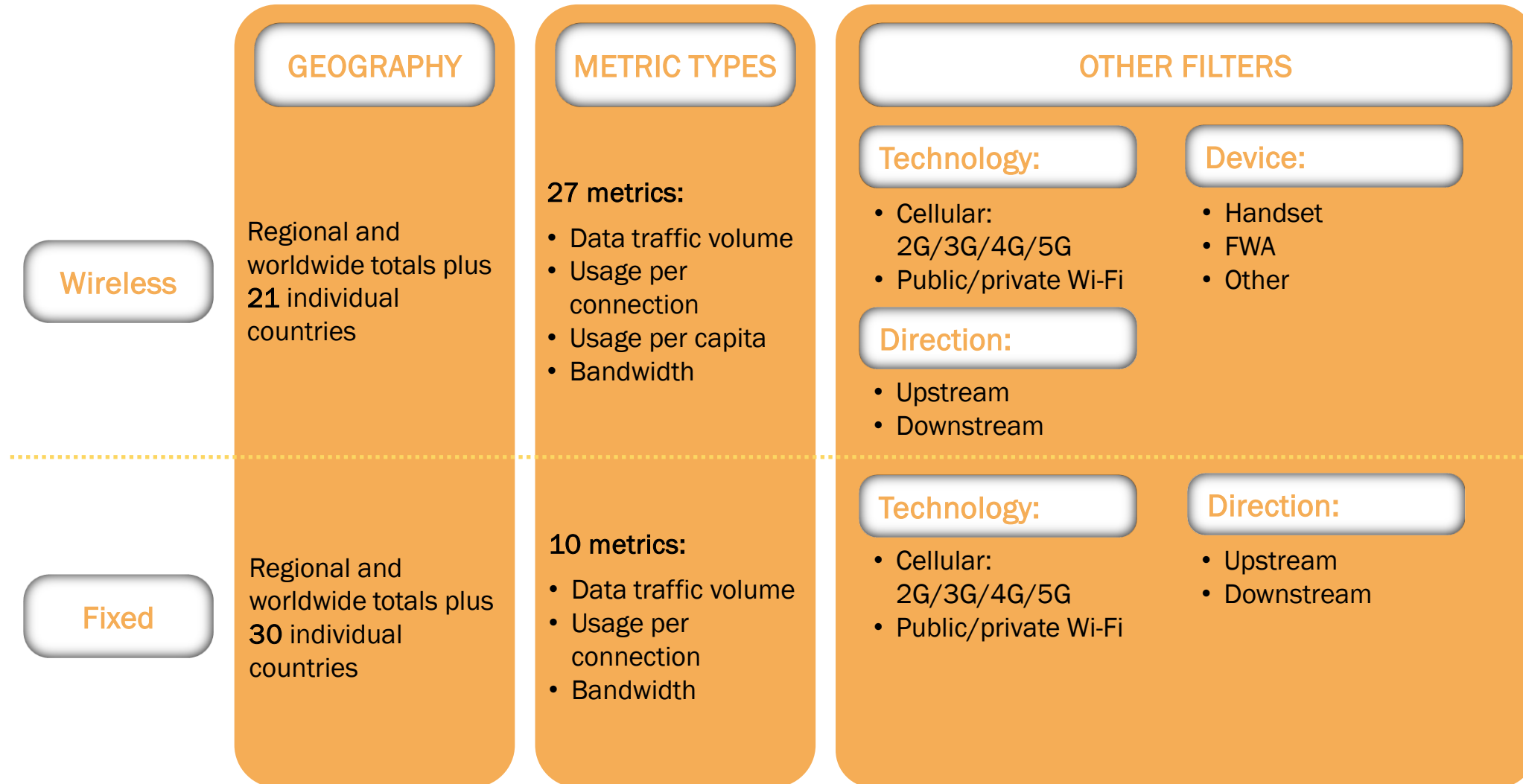
A2P vertical:

- Education
- Financial services
- Government and non-profit
- Healthcare
- Internet, media and entertainment
- Real estate
- Retail
- Telecoms and utilities
- Travel and hospitality

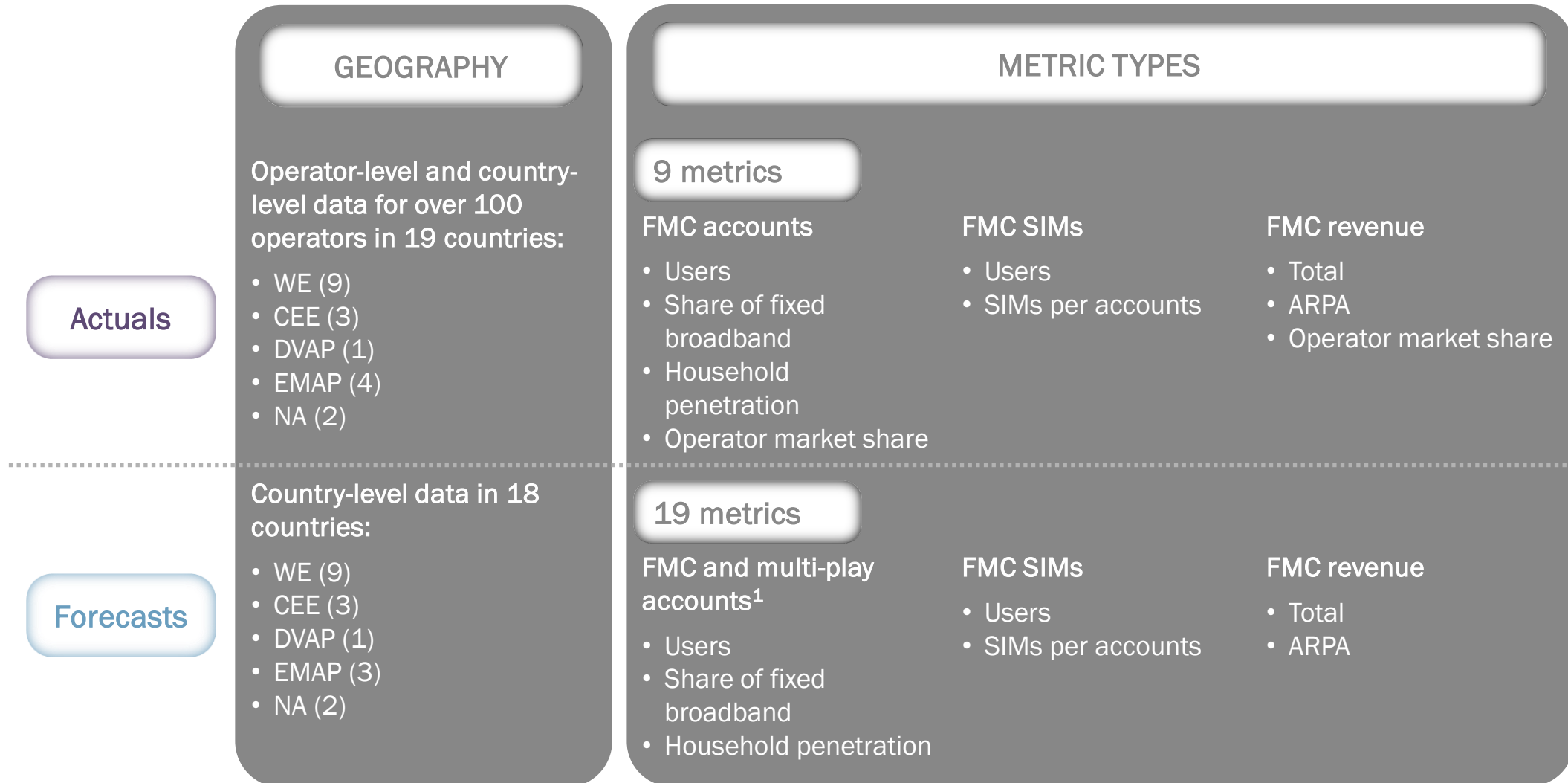
A2P use case:

- Reminder
- Promotional
- Security
- Customer service
- Surveys

Data traffic forecasts

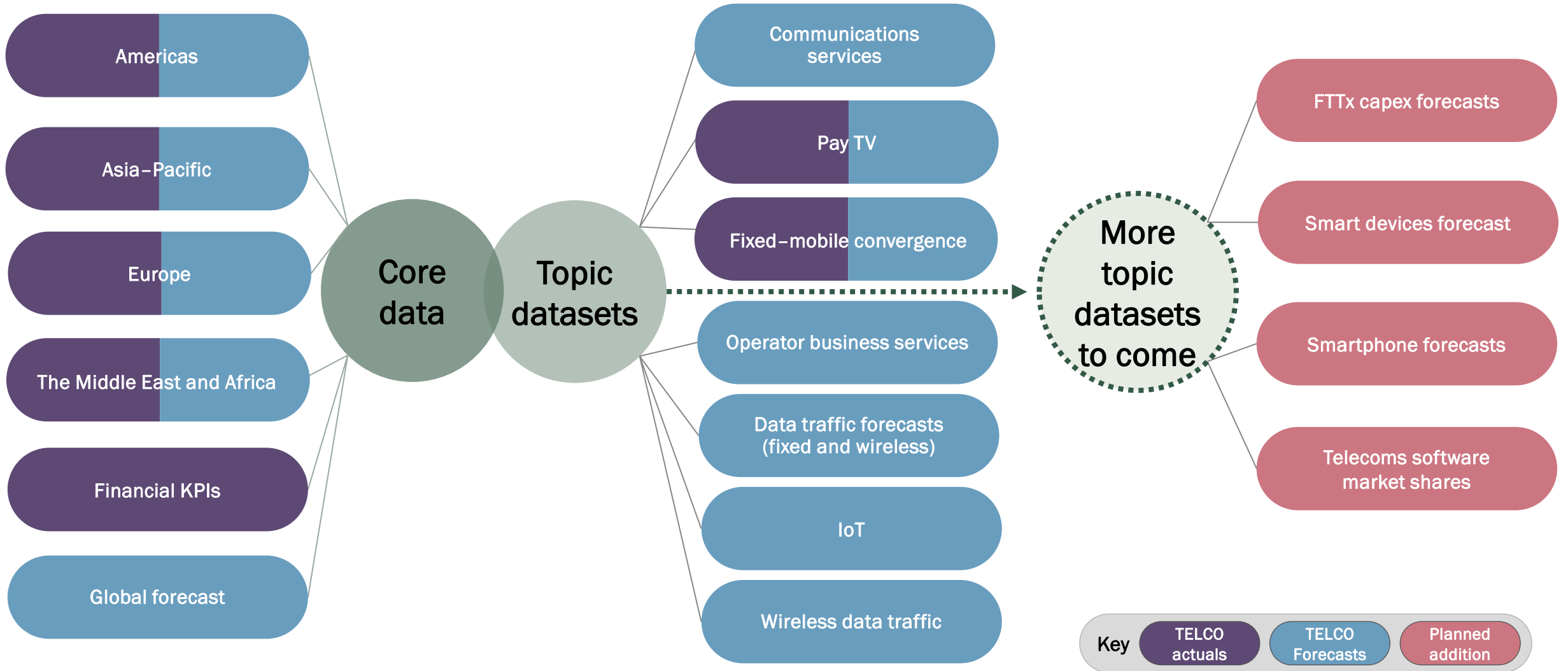


Fixed-mobile convergence quarterly data and forecasts



¹ Multi-play forecast results are available for each of the following: mobile + fixed broadband + pay TV; mobile + fixed broadband only; and fixed broadband + pay TV only

We plan to add additional granular topic datasets to the DataHub 'Telco' portal



The 'SMB Technology Forecaster' portal contains an extensive forecast of business spending on ICT

GEOGRAPHY

- 52 individual countries
- 5 'rest of regions'¹
- 7 regional totals
 - Western Europe
 - Central and Eastern Europe
 - North America
 - Latin America
 - Developed Asia-Pacific
 - Emerging Asia-Pacific
 - Middle East and Africa
- Worldwide total

METRIC TYPES

~ 120 000 metrics:

- Spend
 - (~105 000)
- Firms
 - (~500)
- Installed base
 - (~6300)
- Shipments
 - (~6300)

130+ ICT CATEGORIES

- Business applications
- Collaboration
- Communication
- Cyber security
- Devices and peripherals
- Digital marketing and advertising
- Infrastructure
- IT and managed services
- Web services

13 BUSINESS SIZES

- Home-based business
- Small
 - <5 employees
 - 5 to 9 employees
 - 10 to 19 employees
 - 20 to 49 employees
 - 50 to 99 employees
- Medium
 - 100 to 249 employees
 - 250 to 499 employees
 - 500 to 999 employees
- Large
 - 1000 to 2499 employees
 - 2500 to 4999 employees
 - 5000 to 9999 employees
 - 10000+ employees

19 VERTICAL MARKETS (INDUSTRIES)

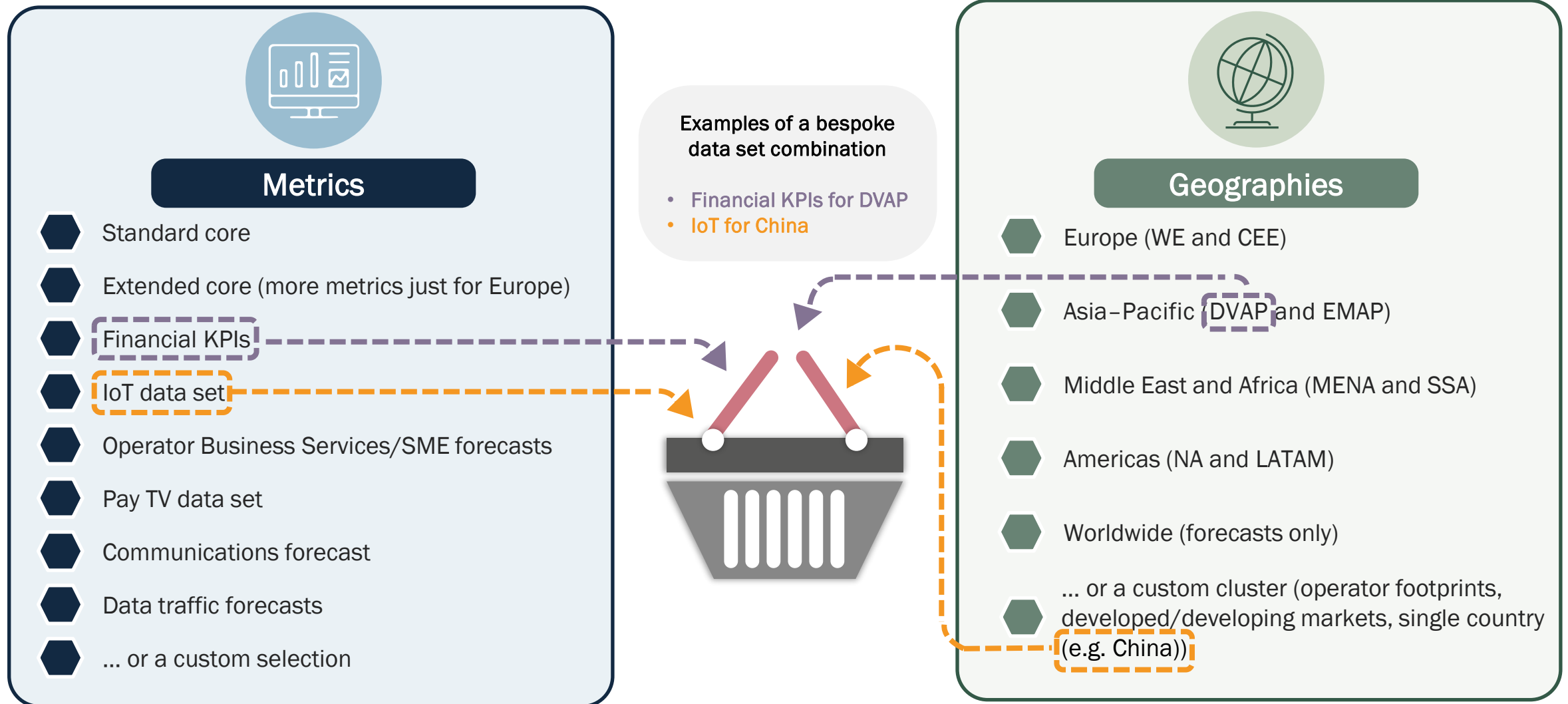
- AMTUC² (5)
- FIRE³ (3)
- Manufacturing (4)
- Other services (4)
- Professional services (1)
- Retail (1)
- Wholesale (1)

5 routes to market

- MSPs and SIs⁴
- Resellers and value-added resellers (VARs)
- Retailers
- Telecoms operators
- Vendors (direct)

¹ 'Rest-of-region' geographies cover the sum of the countries in a region that are not modelled individually. ² AMTUC: agriculture, mining, transportation, utilities and construction industries, including telecommunications. ³ FIRE: finance, insurance and real estate markets. ⁴ MSPs and SIs: managed service providers and systems integrators.

Analysys Mason DataHub: access combines a metric set and a geographical scope – you can choose the elements



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We bring together unparalleled commercial and technical understanding to deliver bespoke consultancy on strategy, transaction support, transformation, regulation and policy, further strengthened by globally respected research.

Our clients value our advice which combines deep domain knowledge with global reach and local insight into markets to help them achieve meaningful business results.

We are committed to our clients, employees and communities – contributing to a world where technology delivers for all.

Our research services



Consumer Services

- Fixed Broadband Services
- Mobile Services
- Fixed-Mobile Convergence
- Smart Devices
- Future Comms
- Video, Gaming and Entertainment



Networks

- Next-Generation Wireless Networks
- Wireless Infrastructure Strategies
- Fibre Infrastructure Strategies
- Operator Investment Strategies
- Telecoms Strategy and Forecast
- Transport Network Strategies



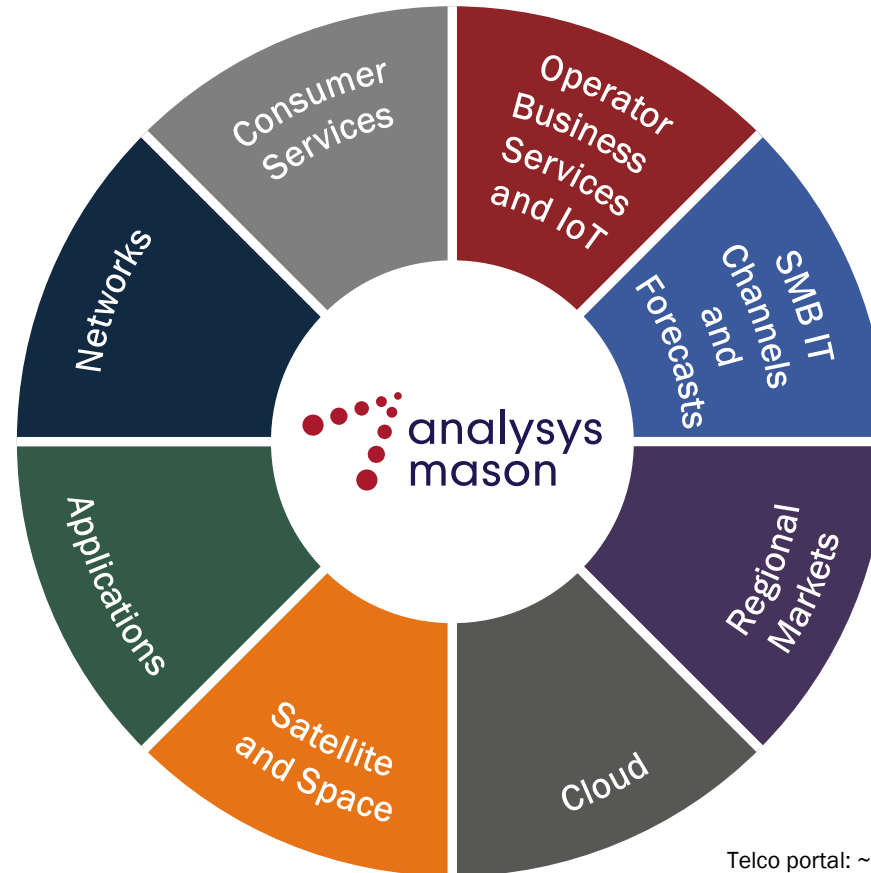
Applications

- Network Automation and Orchestration
- Customer Engagement
- Monetisation Platforms
- Digital Experience
- Automated Assurance
- Service Design and Orchestration
- Telecoms Software Market Shares



Satellite and Space

- Satellite Strategies for Telcos



Operator Business Services and IoT



- Enterprise Services
- SME Services
- IoT Services
- Private Networks
- Cyber Security

SMB IT Channels and Forecasts



- SMB Technology Forecaster

Regional Markets



- Global Telecoms Data and Financial KPIs
- Americas
- Asia-Pacific
- Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports

Cloud



- Cloud Infrastructure Strategies
- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking

DataHub



- Forecast data for 80 countries
- Telco portal: ~2800 forecast and ~320 historical metrics
- SMB Technology Forecaster portal: ~120 000 forecast metrics

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Our areas of expertise



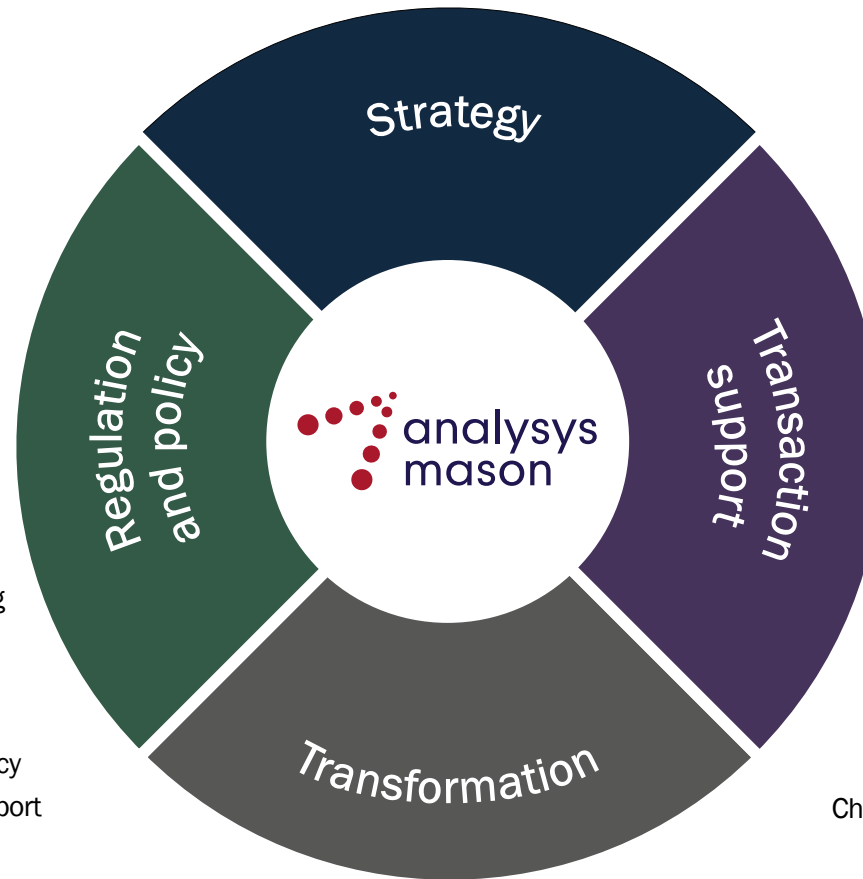
Strategy

- Corporate growth strategy
- Business unit strategy
- Infrastructure strategy



Regulation and policy

- Network and platform
- Public sector broadband intervention
- Accelerating digital transformation of society
- Price controls and cost modelling
- Regulatory accounting
- Regulatory benchmarking and analysis
- Spectrum management and policy
- Expert witness and litigation support
- Postal regulation and policy



Transaction support

- Commercial due diligence and market review
- Technical due diligence
- Post-merger integration
- Periodical business monitoring and loan technical advisory
- Opportunity scouting and pre-deal support



Transformation

- Business transformation
- Digitalisation
- Operational excellence
- Data, BI, steering and insights
- Change and programme management
- Sustainability



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