



MINDIA

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Digital SOHO and SME Operator Services Intelligence Service

Part of the Service Providers Enterprise and Wholesale Area Package

Analysis and data to help operators profit from the SOHO and SME opportunity, with advice on identifying compelling services, developing outcome orientated propositions and exploiting the most appropriate channels to engage different buyer personas that have limited internal IT resources.

PRODUCT OVERVIEW | Digital SOHO and
SME Operator Services Intelligence Service

The VIA logo consists of the letters 'VIA' in a bold, black, sans-serif font. The letter 'V' is stylized with a small circle at its top-left corner. The logo is positioned in the bottom right area of the slide, with decorative dotted patterns in the background.

Digital SOHO and SME Operator Services Intelligence Service

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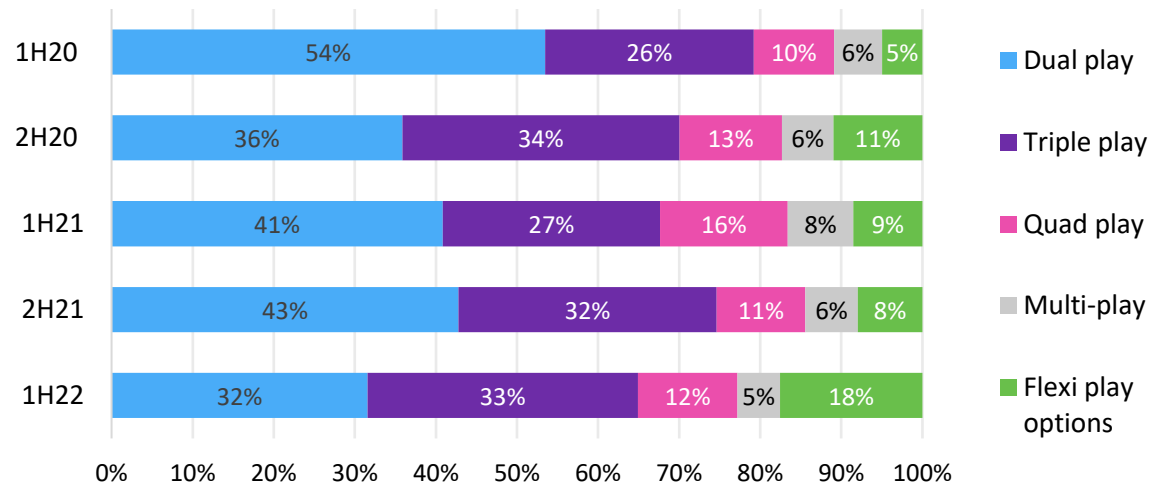
HOW OMDIA HELPS YOU

- Identify compelling, profitable digital services that help smaller businesses thrive.
- Craft integrated propositions that overcome digital service providers' internal silos.
- Determine the correct blend of physical and virtual channels to engage different buyer personas.
- Bridge the digital skills gap between small and large businesses

KEY QUESTIONS ADDRESSED

- What innovative service bundles are digital service providers building for small businesses?
- How can digital service providers differentiate services and compete on more than price?
- How do small businesses use technology to re-inventing their business models in the post-pandemic world?
- What are small businesses' digital demands across developed and growth economies?
- What are service providers' successes and key learnings in addressing small business markets?

Proportion of bundle by types, 1H20–1H22



Source: Omdia

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Digital SOHO and SME Operator Services: Our Expert Analysts



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Digital SOHO & SME Services



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Digital SOHO & SME Operator Services: Deliverables



MARKET DATA

Total Addressable Markets for SMEs – market sizing and five-year forecast across SOHO and SME segments



MARKET TRACKING

Global tracking of innovative service provider bundles for SMEs



REPORTS & DIGITAL PROFILING

Addressing hot topics in today's challenging business environments and virtualizing the SME. Profiles of the major digital service providers and their SME strategies



SURVEY REPORT

Market insight on what SMEs need in the post-pandemic world, including business and tech challenges, investment priorities, and how providers are best positioned to raise them



ANALYST INSIGHTS

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.



ANALYST ACCESS

Prompt responses from Omdia's analyst team to urgent and unique questions.

Digital SOHO & SME Operator Services: Market Data

Total Addressable Markets for SMEs

Market sizing and a five-year forecast for 20 countries across cloud, infrastructure, network, Business Process Outsourcing (BPO), application services, security, and workplace & collaboration services. It can be segmented into three size tiers and 62 services, plus 12 verticals at a global level.

DETAILS

Frequency: Annual

Measures: Service revenues

Company size

- < 10 employees
- 10-49 employees
- 50-249 employees

INDUSTRIES

- Education
- Energy & Utilities
- Financial Services
- Healthcare
- Information Technology
- Manufacturing
- Professional services
- Public sector – Government
- Telco, Media & Entertainment
- Transport & Logistics
- Wholesale & Retail
- Others

MARKETS/REGIONS

- Australia
- Brazil
- Canada
- China
- France
- Germany
- India
- Indonesia
- Italy
- Japan
- Mexico
- Nigeria
- Rest of Africa
- Rest of Central & Southern Asia
- Rest of Eastern Europe
- Rest of Latin America & the Caribbean
- Rest of the Middle East
- Rest of Oceania, Eastern & South-Eastern Asia
- Rest of Western Europe
- Russia
- Saudi Arabia
- South Africa
- South Korea
- Spain
- Turkey
- UK
- USA
- Global Total



Digital SOHO & SME Operator Services: Market Data

Total Addressable Markets for SMEs, cont.

COVERAGE

Application services

- Application professional services and consulting
- Application system integration
- Application testing
- Applications development
- Custom application deployment
- Hosted business intelligence
- Hosted customer relationship management services
- Hosted enterprise resource planning services
- Hosted human capital management
- Hosted applications - others
- Hosted supply chain management
- Mobile applications development

Security

- Data and apps security
- Endpoint security
- Identity and access management
- Incident response
- Managed SOC
- Network security
- Security information and event management services
- Security professional services
- Security services – others
- Threat management

BPO

- Customer engagement BPO
- Finance and accounting BPO
- HR BPO
- Marketing BPO

Cloud

- Business-Analytics-as-a-Service (BAaaS)
- Business continuity
- Cloud professional services
- Contact-Center-as-a-Service (CCaaS)
- Customer-Relationship-Management-as-a-Service (CRMaaS)
- Database-as-a-Service (DBaaS)
- Enterprise-Resource-Planning-as-a-service (ERPaaS)
- Human-Capital-Management as a Service (HCMaaS)
- Infrastructure-as-a-Service (IaaS)
- Managed hybrid cloud services
- Managed private cloud services
- Platform-as-a-Service (PaaS)
- Productivity-tool-as-a-Service
- Supply-Chain-as-a-Service (SCaaS)
- SaaS – Others

Network

- Dedicated internet access
- Fixed broadband services
- Managed LAN services
- Managed router services
- Managed SD-WAN services
- Managed WLAN services
- MPLS

Workspace and collaboration

- Collaborative meeting services
- Contact center professional services
- Managed and hosted contact centers
- Managed IP PBX and UC
- Mobile services
- UCaaS
- UEM-as-a-Service
- Workspace professional services

Infrastructure

- BCDR as a service
- Colocation
- Managed desktop services
- Managed hosting
- Managed storage
- Service helpdesk

Digital SOHO & SME Operator Services: Market Data

Total Addressable Markets for SMEs, cont.

HOW TAM CAN BE USED

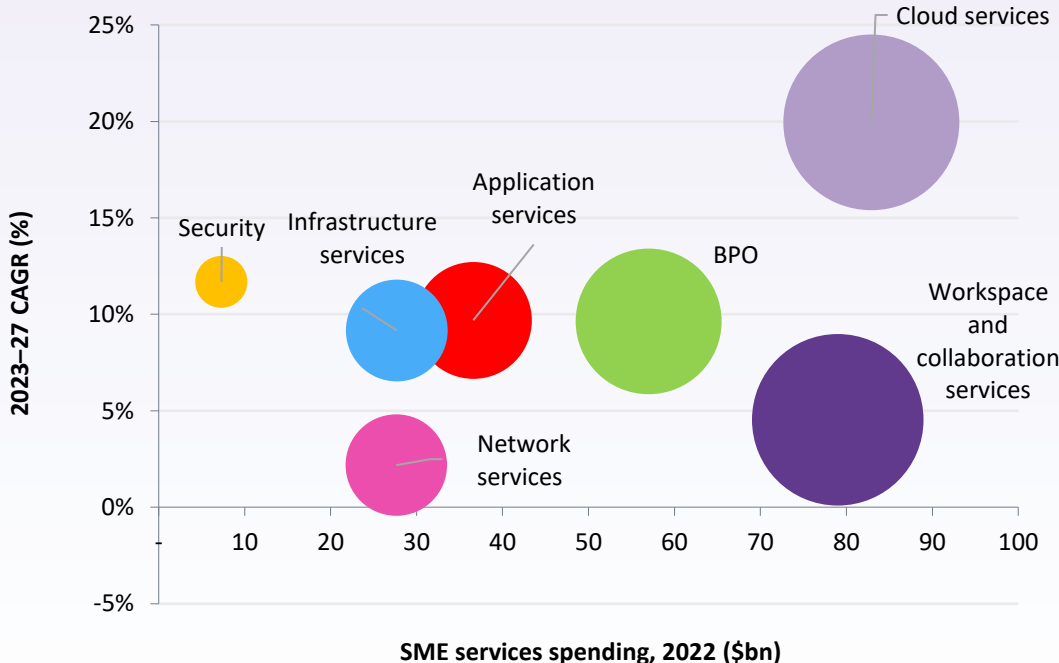
- Help service providers forecast, inform and validate their marketing and channel strategies.
- Identify opportunities in various established and emerging B2B ICT services.
- Plan where best to allocate resources based on expected market developments.
- Target your product and commercial teams to maximize growth.

KEY QUESTIONS ADDRESSED

- What are the top services opportunities over the next five years?
- What will the key growth drivers be over the next five years?
- Where is the market growth rate and the revenue potential?
- How significant will SMEs spend on legacy versus strategic services?
- How will the growth trajectory of strategic services compare with legacy services?

Despite facing inflation headwinds, SMEs will continue to put a premium on cloud services. Cloud will grow at a CAGR of 20.0% globally from 2023-2027

SME services spending changes through 2027



Source: Omdia

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Digital SOHO & SME Operator Services: Forecast Report and Tracking

SME Spending on Services: Worldwide Forecast

Analysis report based on Omdia's Total Addressable Markets for SMEs – 2023–28

DETAILS

Frequency: Annual

Forecast analysis report based on Omdia's Total Addressable Markets for SMEs – 2023–28; identifies and quantifies global SMEs' services spending across cloud, infrastructure, network, BPO, application, security, and workspace & collaboration services spending changes through 2028.

The analysis report will also discuss spending by regional differences, business size tiers (micro, small and medium-sized businesses), and industry changes.

SME Service Provider Bundle Tracker and Analysis

Tracking innovative service provider bundles for SMEs

DETAILS

Frequency: Bi-annual tracker (Excel); analysis report (PPT)

Market tracker and analysis report providing insight into innovative approaches to service bundling and trends by market.

The tracker records telcos selling ICT services to SMEs as a single ICT bundle. It captures data such as operator names, bundle types (dual-play, triple-play, quad-play, multi-play, and flexi-play), bundle descriptions, types of services, prices, value-added services, and more.

The analysis report is the companion to the bundle tracker. It looks at how service providers keep the bundle innovative and relevant to improve their approach to small businesses, including various business cases under the 'bundle spotlight' segment.

Digital SOHO & SME Operator Services: Reports and Survey

Trends to Watch Report

Major trends that Omdia expects to impact the market over the next 12 months

DETAILS

Frequency: Annual

Our Trends to Watch reports provide an annual assessment of the major trends expected to impact SOHO and SME markets for digital services globally in the following year, with recommendations.

Digital Profiling

SME service provider spotlight that assesses challengers in the market for SoHo and SME IT and telecoms services.

DETAILS

Frequency: Semi-annual

Profiles of the major digital service providers in the SME market, with data and analysis of market strategies, positioning, pricing, services and competitiveness.

Digital SOHO & SME Insights

Topical reports and survey analysing SOHO and SME demand for digital services

DETAILS

Frequency: Annual

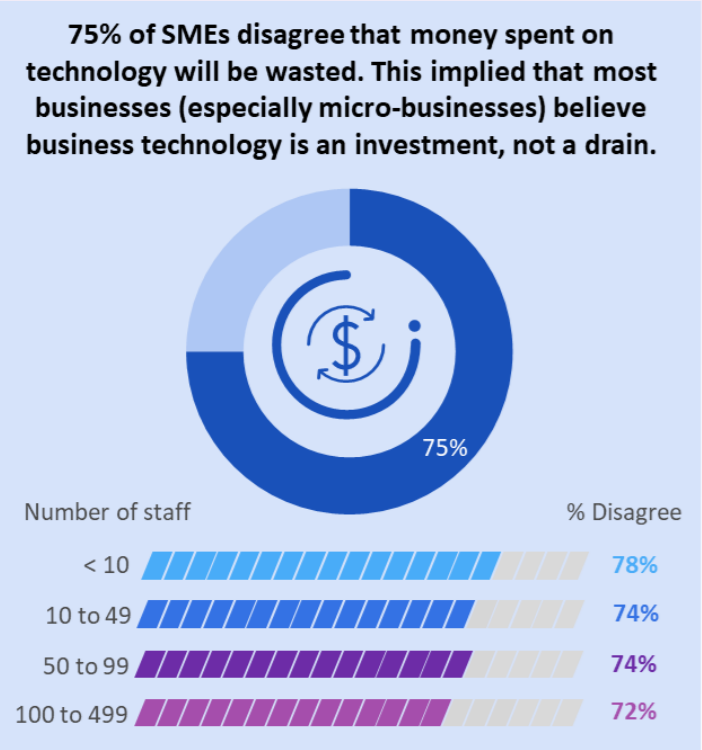
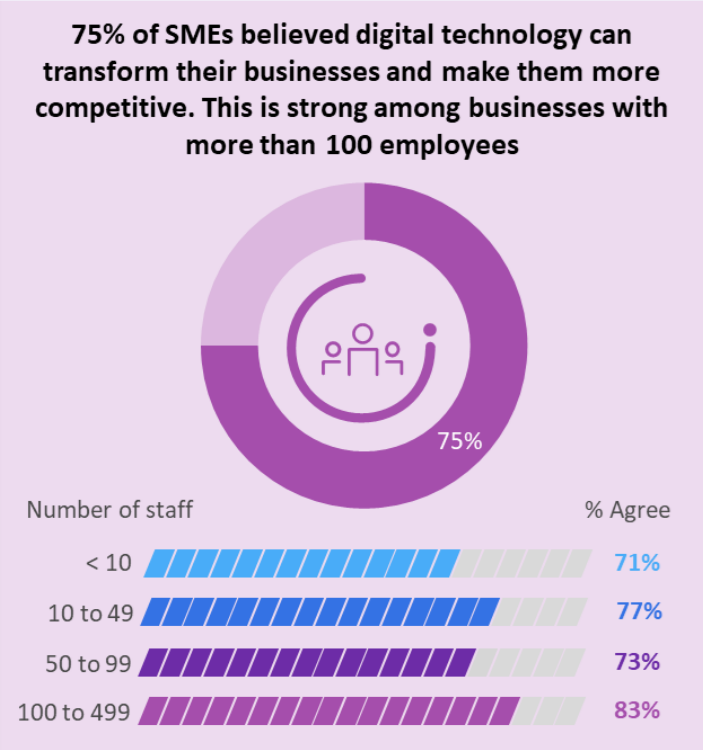
Topical reports include commentary and analysis addressing critical themes that are impacting SOHO and SME services market, i.e., virtualizing the SMEs, reviving SMEs in a post-pandemic recovery.

Survey reports will provide detailed snapshots of how the demand for digital services such as apps, mobility, and cybersecurity from micro, small, and medium-sized businesses has been impacted by the pandemic and recent rising inflation costs. They reflect a spread of critical industries that populate the SoHo and SME universe on a regional basis.

Digital SOHO & SME Operator Services: Survey Report

Example of survey analysis

Business reinvention isn't a choice but a necessity. For SMEs, it is either go digital, or go bust



Source: 2020/21 SoHo & SME Insights Survey, Omdia

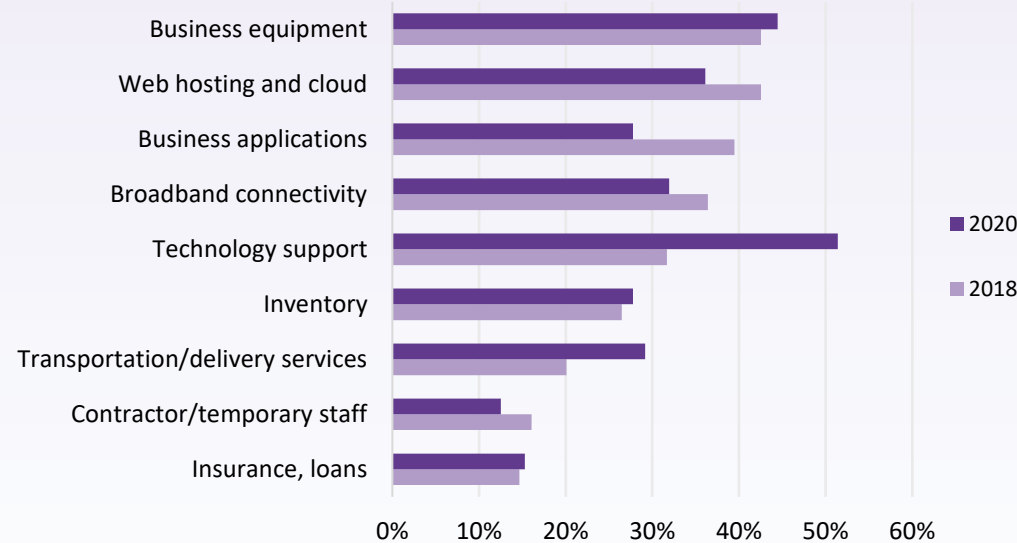
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Digital SOHO & SME Operator Services: Survey Report

Example of survey analysis

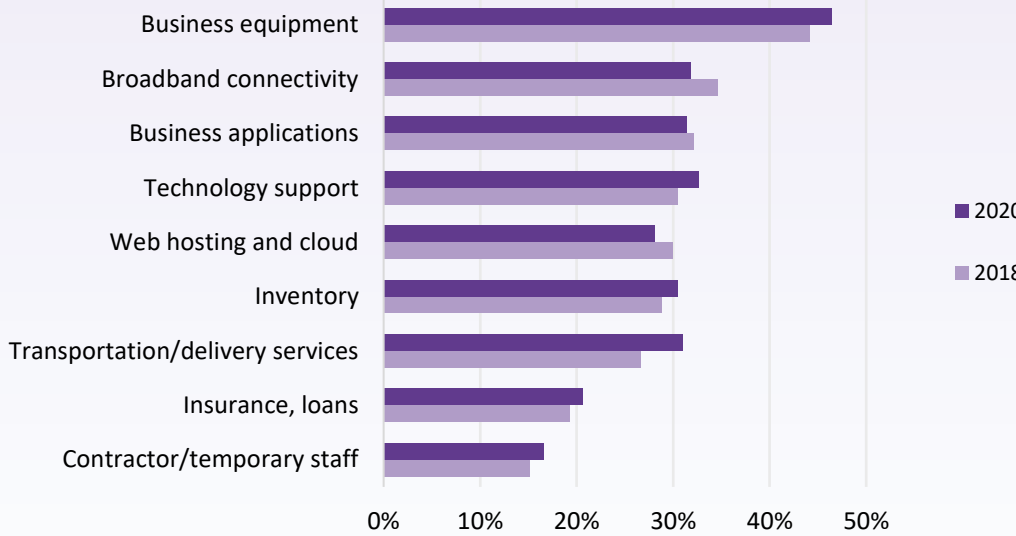
2018 vs. 2020: More SMEs are becoming digital buyers; over 40% of tech and non-tech decision makers are buying IT equipment online

Figure 1: Products and services that SMEs buy online (IT managers)



Notes: n=423 (2018), n=72 (2020/21).
Source: 2018 and 2020/21 SoHo & SME Insights Survey, Omdia

Figure 2: Products and services that SMEs buy online (non-tech decision)



Notes: n=3,625 (2018), n=805 (2020/21).
Source: 2018 and 2020/21 SoHo & SME Insights Survey, Omdia

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To adapt, pivot, and overcome the pandemic-related predicaments, SMEs with less resources are also purchasing external tech support online. Surprisingly, this is high among tech experts—over 51% of IT managers said that they are doing so. This is 18 percentage points higher than the non-expert decision makers.

Digital SOHO & SME Operator Services – Overview '23



MARKET DATA

Total Addressable Markets for SMEs, 2023-28 (4Q23)



MARKET ANALYSIS

SME Spending on Services: Worldwide Forecast, 2022-27 (1Q23)
SME Spending on Security Services: Worldwide Forecast, 2022-27 (1Q23)
SME Spending on Services: Worldwide Forecast, 2023-28 (4Q23)
2024 Trends to Watch: Operator SME Opportunities (4Q23)



MARKET TRACKER

SME Service Provider Bundle Tracker – 2H22 Data (1Q23)
SME Service Provider Bundle Tracker – 2H22 Analysis (2Q23)
SME Service Provider Bundle Tracker – 1H23 Data (1Q24)
SME Service Provider Bundle Tracker – 2H23 Analysis (2Q24)



END USER SURVEY

Digital SOHO & SME Insights, 2023: Beyond Survival, resiliency for the future (2Q23)

Related Content: Service Provider Enterprise & Wholesale Service Area



Service Area Package: **Service Provider Enterprise/Wholesale**

Digital Operator Enterprise
Services Intelligence Service

Digital SOHO & SME Operator
Services Intelligence Service

Enterprise Network Platforms
Intelligence Service

Network Transformation Services
Intelligence Service

Private Networks
Intelligence Service

Wholesale Telecoms
Intelligence Service

Service Provider Enterprise & Wholesale Viewpoint Service

IT Services Contracts
Spotlight Service

About Omdia's Service Provider Enterprise & Wholesale

Omdia helps service providers establish a coherent strategy while building, running, and scaling a profitable B2B business. As more businesses choose to run more ICT as managed or cloud-based services, so service providers find themselves competing against and partnering with, an ever more complex ecosystem of vendors and platform providers.

Omdia's expert team of analysts provides strategic advice based on a robust foundation of market data to help service providers transform how they build, sell, monetize and support new services, from network to cloud, to the digital workplace.

Custom Solutions

Omdia's consulting services offer a true end-to-end service capability across all aspects of your product lifecycle, from concept and product development, to go-to-market and sales effectiveness. *Contact us* if you have a project that you would like to discuss with a member of the team.

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Thank you

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