Argentina - Telecoms, Mobile and Broadband - Statistics and Analyses

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Abstracts

The Argentina - Telecoms, Mobile and Broadband - Statistics and Analyses report includes all relevant BuddeComm research data and analysis. Covering trends and developments in telecommunications, mobile, internet, broadband, infrastructure and regulation. Please review the Executive Summary and Table of Contents for more details.

Government launches the ARS37.9 billion Plan Conectar'

Argentina has an advanced telecom infrastructure though considerable investment is still required to update services in rural areas. To meet pent up demand for telecom services the government has embarked on a large-scale National Broadband Plan. By late 2019 this ARS4.53 billion program to extend broadband services to rural communities, managed by the state-owned infrastructure operator ARSAT, was mostly complete.

Although there are numerous operators licensed to provide services, there remains insufficient competition. The provision of both broadband and mobile services is dominated by a few key players, including Movistar, Telecom Argentina and Claro. The broadband sector is dominated by Movistar and Telecom Argentina, a subsidiary of Cablevisi?n.

Argentina has one of the most dynamic mobile markets in Latin America, being the third largest in the region after Brazil and Mexico. Mobile penetration has fallen in recent years in line with a reduction in the number of subscribers following a long period of steady growth. This is partly due to pricing competition among operators which has reduced the incentive for multiple-SIM card ownership. The regulator has encouraged

the market entry of additional MVNOs to increase competition, though collectively the MVNOs only have a very small share of the market. Market changes are anticipated into 2021 as Telef?nica Group moves its Latin American businesses (with the exception of Brazil) into a single unit.

Operators have trialled 5G though given the continued capacity of LTE infrastructure it is unlikely that commercial 5G services will be available before 2021.

Argentina also has one of the highest broadband penetration rates in Latin America, supported by investment among operators as well as a number of government programs aimed at extending the reach of services. Although the country's economic and political difficulties during the last decade have impacted on sector investments there have been steady improvements in recent quarters, with a considerable proportion of investment being earmarked for expanding fibre networks beyond areas of the principal cities.

This report provides an overview of Argentina's telecom market and regulatory environment, including statistical data and analyses on recent market developments. The report also reviews the fixed and fixed-wireless broadband markets and as well as the mobile voice and data segments, with profiles of the major operators and analyses on technologies deployed and market dynamics. The report in addition provides a number of subscriber forecasts to 2024.

BuddeComm notes that the outbreak of the Coronavirus is having a significant impact on production and supply chains globally. During the coming year the telecoms sector to various degrees is likely to experience a downturn in mobile device production, while it may also be difficult for network operators to manage workflows when maintaining and upgrading existing infrastructure. Overall progress towards 5G may be postponed or slowed down in some countries.

On the consumer side, spending on telecoms services and devices is under pressure from the financial effect of large-scale job losses and the consequent restriction on disposable incomes. However, the crucial nature of telecom services, both for general communication as well as a tool for home-working, will offset such pressures. In many markets the net effect should be a steady though reduced increased in subscriber growth.

Although it is challenging to predict and interpret the long-term impacts of the crisis as it develops, these have been acknowledged in the industry forecasts contained in this report.

The report also covers the responses of the telecom operators as well as government agencies and regulators as they react to the crisis to ensure that citizens can continue to make optimum use of telecom services. This can be reflected in subsidy schemes and the promotion of tele-health and tele-education, among other solutions.

Key developments:

Government announces the launch of ARS37.9 billion Plan Conectar', aiming to boost fixed broadband coverage nationally;

Mobile roaming charges between Argentina and Chile are abolished;

Government declares TV, cable and mobile services as essential public services;

Malbec submarine system linking Sao Paolo, Rio De Janeiro with Buenos Aires operational;

Telecom Argentina intending to increase investment in Uruguay;

Nokia and Metrotel deploy software-defined fibre network;

Lumen Technologies extends Argentina fibre network;

Regulator approves passive infrastructure sharing regulations to lower deployment costs;

Catel's MVNO Imowi' to launch services later in 2021;

Report update includes the regulator's market data to September 2020, telcos' operating and financial data to Q3 2020, Telecom Maturity Index charts and analyses, assessment of the global impact of COVID-19 on the telecoms sector, recent market developments.

Companies mentioned in this report:

Movistar (Telef?nica de Argentina), Telecom Argentina, Grupo Clar?n, Claro (Telmex Argentina), Telecom Personal, Nextel Argentina, DirecTV, IPLAN, IP-TEL, Fecotel, Fecosur, COTEL, Cotecal, ARSAT, INVAP, Nuestro M?vil, Libre.ar, Virgin Mobile, Tesacom, Cablevisi?n, VeloCom, Netizen, Phonevision/Omnivision, Telpin, Supercanal, Telecentro, Red Intercable, MercadoLibre.

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