

Argentina - Telecoms, Mobile and Broadband - Statistics and Analyses

<https://marketpublishers.com/r/AF31BBB119BCEN.html>

Date: December 2020

Pages: 194

Price: US\$ 1,150.00 (Single User License)

ID: AF31BBB119BCEN

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 Telefónica 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 (Telefónica de Argentina), Telecom Argentina, Grupo Claró, Claro (Telmex Argentina), Telecom Personal, Nextel Argentina, DirecTV, IPLAN, IP-TEL, Fecotel, Fecosur, COTEL, Cotecal, ARSAT, INVAP, Nuestro Móvil, Libre.ar, Virgin Mobile, Tesacom, Cablevisión, VeloCom, Netizen, Phonevision/Omnivision, Telpin, Supercanal, Telecentro, Red Intercable, MercadoLibre.

Contents

1 KEY STATISTICS

2 COVID-19 AND ITS IMPACT ON THE TELECOM SECTOR

- 2.1 Economic considerations and responses
- 2.2 Mobile devices
- 2.3 Subscribers
- 2.4 Infrastructure

3 REGIONAL MARKET COMPARISON

- 3.1 Regional Latin America Market Comparison

4 COUNTRY OVERVIEW

5 TELECOMMUNICATIONS MARKET

- 5.1 Historical overview
- 5.2 Market analysis

6 REGULATORY ENVIRONMENT

- 6.1 Regulatory authority
- 6.2 Fixed-line developments
- 6.3 Mobile network developments

7 MOBILE MARKET

- 7.1 Market analysis
- 7.2 Mobile statistics
- 7.3 Mobile infrastructure
- 7.4 Major mobile operators

8 FIXED-LINE BROADBAND MARKET

- 8.1 Introduction and statistical overview
- 8.2 Hybrid Fibre Coax (HFC) networks

- 8.3 Digital Subscriber Line (DSL) networks
- 8.4 Fibre-to-the-Premises (FttP) networks
- 8.5 Other fixed broadband services

9 DIGITAL ECONOMY

- 9.1 E-government
- 9.2 E-education
- 9.3 E-commerce
- 9.4 Online banking

10 FIXED NETWORK OPERATORS

- 10.1 Overview of operators
- 10.2 Telefónica de Argentina (Movistar)
- 10.3 Telecom Argentina
- 10.4 Telecom cooperatives
- 10.5 Telmex Argentina
- 10.6 IPLAN

11 TELECOMMUNICATIONS INFRASTRUCTURE

- 11.1 Overview of the national telecom network
- 11.2 International infrastructure
- 11.3 Wholesale

12 APPENDIX HISTORIC DATA

13 GLOSSARY OF ABBREVIATIONS

14 RELATED REPORTS

List Of Tables

LIST OF TABLES, CHARTS AND EXHIBITS

- Table 1 Top Level Country Statistics and Telco Authorities - Argentina 2020 (e)
- Table 2 Evolution of GDP in Argentina 2010 2020
- Table 3 Telecom revenue by segment (ARS) 2013 2020
- Table 4 Telecom sector ARPU by segment (ARS / month) 2013 2020
- Table 5 Investment by sector 2013 2019
- Table 6 Change in annual mobile numbers ported 2012 2020
- Table 7 Growth in the number of mobile subscribers and penetration 2010 2025
- Table 8 Annual change in the number of mobile subscribers 2010 2025
- Table 9 Change in mobile operators' market share 2010 2020
- Table 10 Change in the ratio of mobile prepaid/postpaid subscribers 2013 2020
- Table 11 Change in the number of prepaid and postpaid mobile subscribers 2013 2020
- Table 12 Growth in mobile market revenue and investment 2013 2020
- Table 13 Development of annualised mobile ARPU 2013 2020
- Table 14 Growth in mobile voice traffic 2013 2020
- Table 15 Growth in the number of Movistar's LTE subscribers and penetration 2016 2019
- Table 16 Increase in the number of LTE base stations in service 2015 2020
- Table 17 Decline in SMS traffic 2010 2020
- Table 18 Growth in the number of active mobile broadband subscribers and penetration rate 2010 2025
- Table 19 Growth in the number of Claro's mobile subscribers 2010 2020
- Table 20 Growth in Claro's wireless revenue 2009 2020
- Table 21 Change in Telecom Personal's mobile subscribers and annual change 2010 2020
- Table 22 Change in the number of Telecom Personal's prepaid, contract, mobile broadband subscribers 2013 2020
- Table 23 Change in telecom Personal's mobile ARPU 2012 2020
- Table 24 Development of Telecom Personal's mobile service revenue 2012 2020
- Table 25 Personal mobile data and voice usage per month 2013 2020
- Table 26 Change in the number of Movistar's mobile subscribers 2010 2019
- Table 27 Development of Movistar's mobile revenue 2009 2019
- Table 28 Decline in Movistar's blended mobile ARPU 2008 2019
- Table 29 Change in broadband market share by technology 2016 2020
- Table 30 Growth in the number of fixed-line internet subscribers and penetration rates 2010 2020

Table 31 Growth in the number of fixed broadband subscribers and penetration rates 2010 2025

Table 32 Decline in the number of dial-up subscriptions 2008 2020

Table 33 Growth in fixed internet services revenue 2013 2020

Table 34 Fixed internet services ARPU 2013 2020

Table 35 Change in the number of fixed broadband connections by access speed 2017 2020

Table 36 Average fixed internet access speed 2015 2020

Table 37 Growth in the number of cable broadband subscribers and penetration 2009 2020

Table 38 Change in the number of DSL subscribers and penetration rate 2010 2020

Table 39 Change in the number of Movistar's broadband subscribers 2009 2019

Table 40 Growth in the number of Telecom Argentina's broadband subscribers 2010 2020

Table 41 Change in Telecom Argentina's broadband ARPU 2011 2020

Table 42 Growth in the number of fibre broadband subscribers 2012 2020

Table 43 Growth in the number of Movistar's FttX broadband subscribers 2016 2019

Table 44 Growth in the number of fixed wireless broadband connections 2010 2020

Table 45 Decline in the number of Telefónica de Argentina's fixed lines in service 2009 2019

Table 46 Development of Telefónica de Argentina's financial data 2014 2020

Table 47 Development of Telefónica de Argentina's annualised fixed ARPU 2017 2019

Table 48 Development of Telecom Argentina's financial data 2011 2020

Table 49 Growth in Telecom Argentina's domestic revenue by service 2011 2020

Table 50 Development of Telecom Argentina's capex and EBITDA 2017 2020

Table 51 Change in the number of Telecom Argentina's fixed lines 2010 2020

Table 52 Growth in the number of Telmex's fixed-line subscriptions 2013 2020

Table 53 Development of Telmex's fixed-line financial data 2013 2020

Table 54 Decline in the number of fixed lines in service and teledensity 2010 2025

Table 55 Decline in fixed-line household teledensity 2013 2020

Table 56 Growth in international internet bandwidth 2010 2017

Table 57 Historic - Evolution of GDP in Argentina 2000 2009

Table 58 Historic - Fixed lines in service and teledensity 1996 2009

Table 59 Historic - Telecom Argentina fixed lines in service 2000 2009

Table 60 Historic - Telefónica de Argentina fixed lines in service 2000 2009

Table 61 Historic - International bandwidth 2000 2009

Table 62 Historic - Movistar wholesale accesses 2005 2017

Table 63 Historic - Internet users and user penetration 1996 2015

Table 64 Historic - Fixed-line internet subscribers and penetration rates 2000 2009

- Table 65 Historic - DSL subscribers and penetration rates 2001 2009
- Table 66 Historic - Cable modem subscribers and penetration rates 2001 2009
- Table 67 Historic - Fixed-line internet subscribers and penetration rates 2000 2009
- Table 68 Historic - Fixed broadband subscribers and penetration rates 2001 2009
- Table 69 Historic - Movistar broadband subscribers 2001 2009
- Table 70 Historic - Broadband market share by provider 2003 2014
- Table 71 Historic - FiberTel broadband subscribers 2003 2016
- Table 72 Historic - DSL subscribers and penetration rate 2001 2009
- Table 73 Historic - Telecom Argentina broadband subscribers 2003 2009
- Table 74 Historic - Mobile subscribers and penetration 1998 2009
- Table 75 Historic - Nextel mobile revenue 2012 2015
- Table 76 Historic - Nextel mobile ARPU 2012 2015
- Table 77 Historic - Mobile operators' market share 1999 2009
- Table 78 Historic - Nextel mobile subscribers 2002 2015
- Table 79 Historic - Telecom Personal mobile subscribers, annual change 1999 2009
- Table 80 Historic - Movistar mobile subscribers 1999 2009
- Table 81 Historic - Claro mobile subscribers 1999 2009
- Table 82 Historic - Change in broadband market share by technology 2001 2009
- Table 83 Historic - Decline in SMS traffic 2007 2009
- Table 84 Historic - Fixed Telephony ARPU (ARS) 2011 2012
- Table 85 Historic - Development of Telefónica de Argentina's financial data 2009 2013
- Table 86 Historic - Development of Telmex's fixed-line financial data 2009 2012
- Table 87 Historic - Growth in international internet bandwidth 2000 2009
- Table 88 Historic Fixed-line subscribers by technology 2010 2015
- Chart 1 Latin America Overall Telecoms Maturity Index
- Chart 2 Latin America Telecoms Maturity Index Market Leaders Category
- Chart 3 Latin America Telecoms Maturity Index Market Challengers Category
- Chart 4 Latin America Telecoms Maturity Index Market Laggards Category
- Chart 5 South America Telecoms Maturity Index by country
- Chart 6 Central America Telecoms Maturity Index by country
- Chart 7 Latin America Telecoms Maturity Index vs GDP per Capita
- Chart 8 South America mobile subscriber penetration versus mobile broadband penetration
- Chart 9 Latin America fixed broadband penetration versus mobile broadband penetration
- Chart 10 Telecom revenue by segment (ARS) 2013 2020
- Chart 11 Telecom ARPU by segment (ARS) 2013 2020
- Chart 12 Telecom investment by segment (ARS) 2013 2019
- Chart 13 Change in annual mobile numbers ported 2012 2020

- Chart 14 Growth in the number of mobile subscribers and penetration 2010 2025
- Chart 15 Change in mobile market share by operator 2010 2020
- Chart 16 Change in the ratio of mobile prepaid/postpaid subscribers 2013 2020
- Chart 17 Change in the number of prepaid and postpaid mobile subscribers 2013 2020
- Chart 18 Growth in mobile market revenue and investment 2013 2020
- Chart 19 Growth in mobile voice traffic 2013 2020
- Chart 20 Growth in the number of Movistar's LTE subscribers and penetration 2016 2019
- Chart 21 Increase in the number of LTE base stations in service 2015 2020
- Chart 22 Decline in SMS traffic 2010 2020
- Chart 23 Growth in the number of active mobile broadband subscribers and penetration rate 2010 2025
- Chart 24 Growth in the number of Claro's mobile subscribers 2010 2020
- Chart 25 Growth in Claro's wireless revenue 2009 2020
- Chart 26 Change in Telecom Personal's mobile subscribers and annual change 2010 2020
- Chart 27 Change in the number of Personal's prepaid and contract subscribers 2013 2020
- Chart 28 Change in telecom Personal's mobile ARPU 2012 2020
- Chart 29 Development of Telecom Personal's mobile service revenue 2012 2020
- Chart 30 Change in the number of Movistar's mobile subscribers 2010 2019
- Chart 31 Development of Movistar's mobile revenue 2009 2019
- Chart 32 Decline in Movistar's blended mobile ARPU 2008 2019
- Chart 33 Change in broadband market share by technology 2016 2020
- Chart 34 Growth in the number of fixed-line internet subscribers and penetration rates 2010 2019
- Chart 35 Growth in the number of fixed broadband subscribers and penetration rates 2010 2025
- Chart 36 Growth in fixed internet services revenue 2013 2020
- Chart 37 Change in the number of fixed broadband connections by access speed 2017 2020
- Chart 38 Growth in the number of cable broadband subscribers and penetration 2010 2020
- Chart 39 Change in the number of DSL subscribers and penetration 2010 2020
- Chart 40 Change in the number of Movistar's broadband subscribers 2010 2019
- Chart 41 Growth in the number of Telecom Argentina's broadband subscribers 2010 2020
- Chart 42 Change in Telecom Argentina's broadband ARPU 2011 2020
- Chart 43 Growth in the number of fibre broadband subscribers 2012 2020

Chart 44 Growth in the number of Movistar's FttX broadband subscribers 2016 2019

Chart 45 Growth in the number of fixed wireless broadband connections 2010 2020

Chart 46 Decline in the number of Telefónica de Argentina's fixed lines in service 2010 2019

Chart 47 Development of Telefónica de Argentina's financial data 2014 2020

Chart 48 Development of Telecom Argentina's financial data 2011 2020

Chart 49 Growth in Telecom Argentina's domestic revenue by service 2011 2020

Chart 50 Change in the number of Telecom Argentina's fixed lines 2010 2020

Chart 51 Growth in the number of Telmex's fixed-line subscriptions 2009 2020

Chart 52 Development of Telmex's fixed-line financial data 2013 2020

Chart 53 Decline in the number of fixed lines in service and teledensity 2010 2025

Chart 54 Decline in fixed-line household teledensity 2013 2019

Exhibit 1 Generalised Market Characteristics by Market Segment

Exhibit 2 South America - Key Characteristics of Telecoms Markets by Country

Exhibit 3 Central America - Key Characteristics of Telecoms Markets by Country

Exhibit 4 Map of Argentina

I would like to order

Product name: Argentina - Telecoms, Mobile and Broadband - Statistics and Analyses

Product link: <https://marketpublishers.com/r/AF31BBB119BCEN.html>

Price: US\$ 1,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/AF31BBB119BCEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970