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Latin America - Mobile Network Operators and MVNOs

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Abstracts

The report provides key information about the mobile operators in Latin America. Topics covered include:

Brief company history and shareholder structure;

Licences and technology deployments;

Subscriber evolution;

Average Revenue per User (ARPU);

Market position;

Latin America Telecoms Maturity Index.

The countries covered in this report include: Argentina, Belize, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, the Dominican Republic, Ecuador, El Salvador, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Puerto Rico, Suriname, Uruguay, Venezuela.

For information on Latin American Mobile Infrastructure see separate report:- Latin America - Mobile Infrastructure.

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EXECUTIVE SUMMARY

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Latin American MNOs extending partnerships on path to 5GThe extensive Latin American region provides a diverse range of markers for the telecoms industry. It includes some smaller countries by population, such as Belize, Panama and Uruguay, as well as some of the largest globally, in Brazil and Mexico with about 206 million and 122 million people respectively. This wide range is mirrored in GDP and GDP per capita, two metrics which have had a bearing on the capacity of governments to fund investments in telecom infrastructure and in telcos to generate revenue from services.

While there are a number of operators in the region there are a few pan-regional players such as Telef?nica and Am?rica M?vil which operate in many markets. As such they are able to capitalise on scale as well as on applying the experiences gained in one market to benefit services in another. This increasingly applies to new and emerging technical areas including the deployment of FttP and LTE-A services and the trial of 5G technologies. These regional operators have responded to competition by expanding their multi-sector offerings, incorporating mobile and fixed-line services as well as digital media.

In general terms, most countries in Latin America have poor fixed-line infrastructure: although it can be sufficiently effective in the major cities, in many semi-urban and rural areas it is woefully inadequate. This state of play has helped the development of mobile voice and broadband services. There have been considerable advances made thus far in the deployment of LTE, even though the platform remains unavailable in many of the less populated or remote areas of the region.

With regards to 5G the principal operators are unlikely to introduce services until 2021 or 2022. Countries in the region have generally been a step behind the US and key European markets in adopting new mobile technologies. To an extent, these latter markets serve as test beds for later deployments in Latin America. Factors which will influence operators’ decisions on timing the launch of 5G within Latin American markets include the success or otherwise of earlier deployments anticipated in the US and Europe, a compelling business case to warrant investment in 5G (while there remains strong potential for LTE), the affordability and availability of 5G-compatible smartphones, and the availability of sufficient spectrum assigned for 5G.

This report provides an overview of the mobile network operators and MVNOs in Latin America. It includes a range of performance indicators (operating and financial data) as well as analyses on recent regulatory developments and issues relating to market competition and to spectrum auctions and refarming.

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Contents

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List Of Tables

LIST OF TABLES, CHARTS AND EXHIBITS

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About

Although there are a number of smaller operators across the region, the mobile market in Latin America continues to be dominated by three operators which each have businesses in multiple countries. The smallest of these four is Luxembourg-based Millicom International, which trades as Tigo. The operator reported having 32.5 million subscribers in its six markets in Central and South America as of March 2016. Telefónica Group reported having 186.4 million subscribers in the region. For reporting purposes the Group now separates its Brazilian unit from the remaining units which come under the Telefónica Hispanoamérica umbrella (including Argentina, Chile, Peru, Colombia, Mexico, Ecuador and Uruguay). Mexico's América Móvil, trading as Telcel in its domestic market and as Claro in the remaining 16 markets in the region, reported having 285.2 million subscribers. Other international players include Telecom Italia, which has more than 75 million mobile subscribers in Brazil, and AT&T Mexico, which although is the smaller operator in that country has ambitions to develop its North American Mobile Service area covering more than 400 million people in Mexico and the US. To this end AT&T Mexico secured spectrum in the AWS band earlier in 2016 to facilitate roaming and other services for its subscribers in the two countries.

The dominance of these operators is being gradually eroded as a result of efforts by a number of national regulators to facilitate the entry of MVNOs and to encourage the participation of smaller players in spectrum auctions. In Mexico, Telcel is being obliged to reduce its market share from 68% as of early 2016 to below 50% by the end of 2018. The company is achieving this by selling assets regionally, which is making room for other operators. There are now several MVNOs offering services in Mexico, although collectively they only have a market share of about 1%.

Operators have had mixed results during the last few quarters. Although the general trend for customer acquisitions and revenue is encouraging, some markets have proved to be difficult. Countries such as Venezuela and Brazil are undergoing considerable economic hardship, as well as dysfunctional political processes, which has stymied revenue growth. América Móvil reported a 9.2% fall in the number of mobile subscribers in Brazil in the year to March 2016, which contributed to the 0.7% fall in revenue in the period. Telefónica Group suffered a 16.7% drop in reported revenue in its Hispanoamérica markets despite a modest lift in the number of subscribers, and a 13% drop in revenue for its Brazilian unit, the latter partly explained by a 10.% decline in the subscriber base. In addition, operators are facing revenue continued pressure from reduced mobile termination rates and regulated tariffs for call and data pricing, while the popularity of OTT messaging services has considerably reduced the volume of SMS traffic, and with it placed further stress on operator revenue.

As these several pressures will continue further into 2016, operators will be encouraged to invest in LTE infrastructure and enhance their mobile data and broadband offerings in a bid to secure revenue growth.

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