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Central America Telecommunications Report Q3 2016

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Abstracts

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BMI View: The region's telecoms markets are increasingly competitive, with four out of eight Central American countries having introduced mobile number portability. In several Central American markets, high mobile penetration rates have significantly slowed subscriber growth. However, markets such as Nicaragua offer considerable growth potential. Government intervention remains a problem in some regional markets such as Guatemala, where it is seemingly increasing. Across the region, data-driven 3G/4G services offer strong future potential and the region's largest operators are investing heavily into new infrastructure and technologies for such technological uptake.

Key Data

We have revised our forecasts for the Guatemalan mobile market and hold the view that a much slower growth will be seen throughout our forecast period to 2020. Continued growth will also be counterbalanced by the deduction of inactive prepaid accounts from operators' reported total.

In El Salvador, which has one of the region's highest mobile penetration rates, the competitive environment is strong, but there are signs that subscriber growth is slowing down. We expect the trend of steady but moderate growth to continue throughout our forecast period to 2020. Operators, however, will have new opportunities in 3G and 4G services and offering mobile data products to their subscribers.

The high mobile penetration rate in Honduras suggests there is a high proportion of multiple SIM owners and inactive subscriptions that were taken up due to operator promotions. However, we believe operators will focus on driving

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up revenues from existing subscribers and focus less on acquiring new ones. This is amid an increasing focus on 4G and increasing availability of 3G and lower cost smartphones.

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