

Chile Telecommunications Report Q3 2016

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Abstracts

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BMI View: Increased access to 3G/4G services, as operators launch LTE in acquired 700MHz spectrum, later in the year, will spur growth in the market. This will trickle down growth in to the mobile broadband segment, in particular, within rural areas. We also anticipate moderate growth to continue in the fixed line services supported by multi-service capabilities of existing infrastructure. The discounting of inactive users will however see negative net subscriber additions in some quarters moving forward.

Latest Updates & Industry Developments

Chile's mobile market lost an estimated 433,000 subscribers in 2015 and we attribute this largely due to the discounting of inactive SIM cards. The prime focus of the three large operators is now on migrating prepaid customers to value added data packs. 3G and 4G services will be the primary drivers of growth with 3G and 4G connections now expected to surpass 23mn by the end of our newly extended forecast period in 2020.

Broadband internet subscriptions will surpass 4.1mn by the end of 2020, up 3.52mn at the end of 2015 and equivalent to a penetration rate of almost 22%. Encouraging signs for fixed broadband show that fibre-optic connections are beginning to play an important role in the market. The proliferation of 4G LTE services will also help maintain medium-term growth momentum.

Chile's President Michelle Bachelet has unveiled the country's Digital Agenda 2020 plan, promising to reduce the digital divide. Under the plan, which contains a total of 60 measures to be developed via public and private partnerships, the government intends to double broadband penetration to 90% over the next five

years. Internet is currently available to only 42% of homes in Chile's rural areas, according to Bachelet.

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