

# Colombia Telecommunications Report Q1 2016

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## Abstracts

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**BMI View:** We retain the view in our Q1 2016 report that the Colombian market is witnessing a systemic shift where traditional mobile operators are witnessing a loss in their share and market positions as the MVNO and low cost carriers begin to make a significant dent in the landscape. The recent CRC legislation that aims to simplify the market entry and operation of MVNOs will further force ARPU levels downwards. 4G and LTE uptake is not significant enough at this point to entirely alter the dynamics of the industry growth. Nevertheless, the market has posted strong growth in the past three years and we believe this trajectory will continue at a reduced pace. However, we caution that a sizeable number of inactive accounts may exist in the market.

### Latest Updates & Industry Developments

The market contracted in Q2 2015 by 1.13mn subscribers after having grown significantly for around 12 quarters. We believe this may be due to a high number of inactive sim connections that were discounted.

Mobile virtual network operator (MVNO) Virgin Mobile Colombia's subscriber base was 2.118mn by the end of March 2015, compared to 440,667 a year earlier, according to data from Ministry of Information Technologies and Communication (MinTIC). Other local MVNOs Uff! Movil, Grupo Exito, Avantel and Empresa de Telecomunicaciones de Bogotá (ETB) registered 1.182mn subscribers total at the end of 2014.

## Contents

BMI Industry View

SWOT

Telecoms

Industry Forecast

Wireline Voice & Broadband

Table: Telecoms Sector - Historical Data & Forecasts (Colombia 2013-2019)

Industry Risk Reward Index

Industry Risk Reward Ratings

Table: Latin Americas Telecoms Risk/Rewards Index - Q1 2016

Market Overview

MVNOs Making An Impact

Wireline Voice & Broadband

Table: Wireline Internet Subscribers By Technology ('000), 2014

Pay-TV

Fixed-Line

Regulatory Development

Table: Colombia Regulatory Bodies And Their Responsibilities

Key Developments

Competitive Landscape

Table: Key Players - Colombia Telecoms Sector

Table: Colombia Mobile Market Overview 2013-2015

Table: Claro 2013-2015

Table: Movistar 2013-2015

Table: Tigo 2013-2015

Company Profile

Claro

Movistar

Tigo

Demographic Forecast

Table: Population Headline Indicators (Colombia 1990-2025)

Table: Key Population Ratios (Colombia 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Colombia 1990-2025)

Table: Population By Age Group (Colombia 1990-2025)

Table: Population By Age Group % (Colombia 1990-2025)

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Risk/Reward Index Indicators

Table: Weighting Of Indicators

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