

Colombia Telecommunications Report Q3 2016

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Abstracts

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BMI View: We believe that the Colombian mobile market is beginning to slow down after posting robust growth in preceding years. The negative impact of inactive SIMs being discounted was evident, as the market recorded sharp negative subscriber losses in Q2 and Q3 of 2015. Looking ahead, BMI holds the view that market momentum will begin to slow down. 4G uptake is still at a nascent stage of development, but we note that the CRC and MinTLC will be crucial in encouraging data consumption growth. ARPUs will trend downwards - at least throughout the short term - due to the low cost strategies employed by MVNOs.

Latest Updates & Industry Developments

The market contracted in Q2 and Q3 2015 by 1.293mn 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. The market ended 2015 with total net new subscribers of only 35,000, compared with more than 5.03mn new subscribers in 2014.

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.

The broadband market's growth is supported by ongoing interest in dedicated mobile broadband connections, which BMI believes will drive the long term

growth potential.

MinTIC met its goal to quadruple the number of internet connections from around 2.2mn at the end of 2010 to 8.8mn by 2014.

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