

Mexico Telecommunications Report Q1 2016

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Abstracts

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BMI View: Regulatory changes against America Movil's domination have made the Mexican market more attractive to investors, as highlighted by AT&T's entry into the mobile market. It will also compete with Telefonica, bringing three international players into competition. The main areas of competition will be LTE services, with extra investments, and a North American single market. On the fixed side, convergence will be the core driver, especially if America Movil convinces the regulator to let it offer pay-TV. Unbundling its network should help drive competition for broadband, but the quality of service remains an issue. Furthermore, making the incumbent's share drop below 50% will need some more regulatory work, such as divestments.

Key Data

The Mexican mobile market has suffered volatility in recent quarters, with the latest major event being AT&T's restating lusacell figures. As of June 2015, there were 104.232mn subscriptions in the market

The broadband market is slowly improving its speed and quality of service, thanks to the growing number of cable subscriptions, which reached 28.8% in Q115

The fixed voice market is expanding, reaching 20.92mn in Q115, driven by convergence. The success of cable players has offset continuous losses for the legacy players such as Telmex and Axtel

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