

Mexico Telecommunications Report Q4 2012

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Abstracts

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BMI View: The Mexican market is one of the least penetrated in the region, with some of the highest tariffs. This is the result of poor competition. However, new President Enrique Peña Nieto has made tackling this a priority. Also, fourth largest operator Iusacell is to get a financial boost from its merger with Televisa, which BMI hopes will improve competition.

Key Data

In Q212 Cofetel revealed there were 95.6mn mobile subscribers in the country, making a penetration rate of 85.6%.

The fixed-line market recorded 19.643mn lines in service at the end of April 2012 (19.750mn at the end of Q112). The Q112 figure is higher than the Q411 figure, but April results fall below Q411's 19.68mn.

Cofetel revealed there were more than 40.605mn internet users in Mexico at the end of 2011, and 12.855mn internet subscriptions excluding 3G mobile subscriptions.

Risk/Reward Ratings

Mexico fell one place to fourth position in our Q412 ratings. This was due to deterioration in the Industry Rewards score, which fell 5 points in the quarter. The Mexican market took a severe hit in Q411 when it lost 3mn subscribers, and Q112 only managed to add 687,000 - in contrast, in the preceding eight quarters, it had added

more than 1mn subscribers per quarter, and growth of more than 2mn in Q410 and Q111.

Key Trends & Developments

In June 2012 Grupo Televisa and Iusacell accepted the conditions laid down by the country's competition regulator Cofeco. Televisa said last week that it had agreed to a series of conditions imposed by Cofeco to let it buy 50 percent of Iusacell, a US\$1.6bn deal.

Movistar and Iusacell announced plans to share networks in a move aimed to boost their competitiveness with América Móvil's Telcel operations, which dominate the market.

In May 2012, Cofeco revoked its US\$1bn fine for mobile firm Telcel. The firm agreed to a list of commitments aimed at ensuring it does not inhibit competition in the sector in future.

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