

Uruguay Telecommunications Report 2016

<https://marketpublishers.com/r/U8BFF7B5905EN.html>

Date: February 2016

Pages: 43

Price: US\$ 1,295.00 (Single User License)

ID: U8BFF7B5905EN

Abstracts

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BMI View: We highlight Uruguay as one of the most developed telecoms markets in Latin America, particularly in the mobile segment, where it leads the region in smartphone penetration, postpaid subscriber mix and 3G/4G uptake. All three mobile operators have launched 4G services as of September 2014, with competition expected to drive uptake. The success of the Uruguayan mobile market has largely been a result of its strong economic performance, which has led to high consumer purchasing power. Organic growth will be limited due to the high penetration rate and the fact that the market is already driven by a high number of dual sims and perhaps a sizeable portion of inactive accounts not yet discounted. Nevertheless, BMI remains concerned about the risk of government involvement in the sector through its lack of a truly independent regulator and its stake in Antel. We believe that policymaking will be characterised by broad continuity and is therefore likely to see Antel remain in state hands.

Latest Updates & Industry Developments

The mobile penetration rate has inched past the 160% mark in 2015 and we believe that the market is highly saturated with very few organic growth opportunities in the mobile sector.

We have positively revised our figures for the uptake of 3G and 4G services and we are of the opinion that modest growth opportunities will be found in the advanced data and smartphone usage subsectors.

Fixed-line services will begin to decline as mobile substitution begins to take place.

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