

Chile Telecom Market, By Service Type (Mobile, Fixed Data), By Technology (2G, 3G, 4G, 5G, Wi-Fi, Fiber-optic), By End User (Residential, Enterprise, Government), By Company Size (Small & Medium-Sized Enterprises (SMEs), Large Enterprises), By Business Model (Mobile Network Operators (MNOs), Fixed-line Operators (FLOs), Internet Service Providers (ISPs), Over-the-top (OTT)) By Region, Competition, Forecast & Opportunities, 2019-2029F

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Abstracts

Chile Telecom Market was valued at USD 4.10 Billion in 2023 and is expected to reach USD 6.63 Billion by 2029 with a CAGR of 8.19% during the forecast period.

The telecom market refers to the industry that provides telecommunications services, including the transmission of data, voice, and video communications through various mediums such as wired, wireless, and satellite technologies. This market encompasses a wide range of services, including broadband internet, mobile networks, fixed-line telephony, and other communication services that connect individuals, businesses, and governments. Key players in the telecom market include telecom service providers, infrastructure companies, equipment manufacturers, and software developers.

Key Market Drivers

Technological Advancements and 5G Deployment

One of the primary drivers of the Chilean telecom market is the ongoing technological

advancements, particularly the rollout of 5G networks. The introduction of 5G is set to revolutionize the telecom industry in Chile by offering significantly faster data speeds, lower latency, and the capacity to connect millions of devices simultaneously. This transition is particularly crucial in a country like Chile, which is striving to modernize its infrastructure and improve connectivity in rural and remote areas. With the growing demand for high-speed internet, the deployment of 5G technologies will enhance mobile broadband services and create opportunities for the development of new applications, such as smart cities, autonomous vehicles, and augmented reality, which will stimulate further growth in the telecom market.

Chile's telecom operators, including Entel, Movistar, and Claro, have already started rolling out 5G networks in key urban centers. The government, too, is actively supporting this transition with regulatory frameworks that encourage investment in telecom infrastructure and facilitate the auctioning of 5G spectrum. This investment is crucial for attracting foreign and domestic capital into the country's telecom sector, as it will not only enhance the user experience but also enable new business models and digital services that can improve productivity across various sectors, including agriculture, healthcare, and education. Moreover, the rise of Internet of Things (IoT) applications, such as connected devices and sensors, will require the high bandwidth and low latency that 5G offers. With the vast geographical expanse of Chile, including its mountainous terrain and remote regions, 5G connectivity is expected to overcome many challenges in providing consistent internet access. This widespread coverage will allow businesses to operate more efficiently and increase the country's competitiveness on a global scale. The technological shift to 5G will also serve as a catalyst for the growth of cloud computing, AI, and other emerging technologies, further driving the telecom market in Chile.

Increasing Demand for Mobile Data and Internet Services

A key driver of growth in the Chilean telecom market is the increasing demand for mobile data and internet services. The widespread adoption of smartphones, growing reliance on digital services, and the ongoing trend toward remote work and online learning have significantly boosted the need for high-speed, reliable internet access. Mobile data consumption has surged in recent years as consumers and businesses rely on mobile apps, video streaming services, social media, and cloud-based solutions for communication, entertainment, and productivity.

According to data from the International Telecommunication Union (ITU), the number of internet users in Chile has steadily increased, reflecting the country's growing

digitalization. Mobile internet, in particular, has become a cornerstone of daily life, with a significant portion of the population using smartphones as their primary access point to the internet. This trend has placed considerable pressure on telecom providers to upgrade their infrastructure to accommodate the rising demand for high-quality, high-speed mobile internet.

The demand for data is not limited to individual consumers; businesses are also shifting towards cloud-based services, e-commerce platforms, and collaborative tools that require robust internet connections. This shift towards digital transformation is creating a huge demand for both fixed broadband and mobile internet services. Telecom providers in Chile are investing heavily in expanding their data infrastructure, including increasing bandwidth capacity and enhancing network performance, to meet this demand. Additionally, the growth of video streaming platforms like Netflix, YouTube, and local content providers has further accelerated the consumption of mobile and fixed internet data.

The Chilean government has also been actively promoting digital inclusion, with initiatives aimed at expanding internet access to underserved areas. This is helping to increase the overall internet penetration rate, leading to more demand for telecom services across all regions. The rising consumption of digital content, coupled with government policies supporting connectivity, is expected to continue driving the growth of the Chile telecom market in the coming years.

Government Policies and Regulatory Support

Government policies and regulatory frameworks play a critical role in shaping the growth and development of the telecom market in Chile. The Chilean government has been proactive in promoting digital inclusion, enhancing connectivity across urban and rural areas, and fostering competition among telecom providers to ensure high-quality, affordable services for consumers. Over the years, Chile has implemented several regulatory measures aimed at improving the accessibility of telecom services and attracting investment in the sector.

One of the key initiatives is the digital infrastructure expansion program, which focuses on increasing internet penetration in remote and rural regions, where telecom services have historically been less accessible. The government's commitment to improving broadband connectivity in these areas is helping to bridge the digital divide, enabling a larger portion of the population to access essential services like education, healthcare, and e-commerce. This initiative is also encouraging private sector investment in network

infrastructure, especially in underserved regions.

Another important regulatory driver is the government's role in managing spectrum allocation. Chile's Subsecretaría de Telecomunicaciones (Subtel) is responsible for managing the allocation of radio frequency spectrum to telecom companies, ensuring that sufficient bandwidth is available for the deployment of new technologies, such as 5G. Through spectrum auctions, Subtel has been able to facilitate the expansion of high-speed mobile networks, which will further boost the telecom market in the country. In addition, Chile has implemented policies that encourage competition among telecom service providers, leading to lower prices and improved service offerings for consumers. These pro-competitive policies have spurred innovation and improved customer satisfaction. With a focus on transparency, fairness, and consumer rights, the government has created a conducive environment for both local and international players to invest in the Chilean telecom market.

As a result, government support in the form of infrastructure investment, spectrum management, and regulatory frameworks continues to be a major driver of the telecom market in Chile. These efforts will likely continue to stimulate growth and innovation in the industry, ensuring that Chile remains a leader in telecom services in Latin America.

Key Market Challenges

Geographic and Topographic Challenges

One of the major challenges facing the Chilean telecom market is the country's geographic and topographic diversity, which poses significant difficulties for the expansion of telecom infrastructure. Chile is a long and narrow country, stretching over 4,000 kilometers from north to south, with a wide range of landscapes, including deserts, mountains, forests, and coastal areas. This diverse geography creates obstacles for telecom companies in providing reliable services, particularly in remote and rural regions.

In northern Chile, the Atacama Desert is one of the driest places on Earth, where infrastructure development is challenging due to extreme weather conditions and vast expanses of barren land. In contrast, southern Chile is characterized by rugged terrain, with mountains, fjords, and forests, making it difficult to lay fiber-optic cables or install cell towers. Moreover, the southernmost parts of Chile extend into Patagonia and the Antarctic region, where the population density is extremely low, and building and maintaining telecom infrastructure can be cost-prohibitive for companies.

Despite these challenges, telecom providers have made efforts to expand their networks to underserved areas. However, providing comprehensive and consistent coverage in remote and mountainous areas requires significant investments in infrastructure and technology. In rural areas, the high cost of installation and maintenance often outweighs the potential customer base, making it less attractive for private companies to expand services. This has resulted in significant digital divides between urban and rural areas, where urban centers like Santiago enjoy access to advanced 5G and fiber-optic networks, while rural communities may still face limited connectivity options, relying on slower 3G or satellite internet services.

The government has recognized this challenge and has initiated various programs to improve connectivity in remote regions, such as through public-private partnerships and subsidies for telecom companies. Programs like the 'Internet for All' initiative aim to extend broadband coverage across the country, but the geographical complexity of Chile means that full nationwide connectivity will remain a long-term goal, requiring continuous investments and technological innovations.

Regulatory and Competitive Pressures

The Chilean telecom market faces several challenges related to regulatory pressures and intense competition. While regulatory frameworks have helped promote competition and improve service quality, they have also created complexities for telecom operators and service providers operating in the country.

One of the significant regulatory challenges is spectrum allocation. The Chilean government, through its regulatory body Subsecretaría de Telecomunicaciones (Subtel), is responsible for managing the allocation of radio frequencies for mobile operators. While this system aims to ensure fair distribution and prevent monopolies, frequent spectrum auctions and shifting policies can create uncertainty and impact the long-term planning of telecom operators. For instance, operators must invest substantial sums to acquire spectrum licenses, and any delay or complication in auctions can disrupt the planned expansion of network coverage, particularly for emerging technologies like 5G.

In addition, regulatory requirements around net neutrality and service pricing can impact profitability for telecom providers. Net neutrality laws, which require internet service providers to treat all internet traffic equally without discrimination, can limit telecom companies' ability to prioritize certain services or introduce tiered pricing models based

on data usage. While these policies are designed to protect consumers and ensure fair access to the internet, they reduce the flexibility of telecom companies in structuring their pricing strategies and service offerings. Moreover, the Chilean telecom market is highly competitive, with several major players—such as Entel, Movistar, and Claro—dominating the market. While competition can benefit consumers by driving prices down and improving service quality, it also pressures telecom companies to continuously invest in infrastructure and technology to maintain or grow their market share. Smaller operators may find it difficult to compete with the larger, more established players, leading to consolidation in the market. This competitive pressure can also result in price wars, which may drive down profit margins for telecom providers and hinder their ability to invest in advanced technologies or improve customer service.

The Chilean telecom sector is also impacted by international competition, as foreign companies look to expand their operations in the region. With the growing demand for data and internet services, global telecom giants may seek to enter the market, further intensifying competition and putting pressure on local providers to innovate.

The combined effect of regulatory complexity and fierce competition in the telecom market presents ongoing challenges for companies looking to maintain profitability while meeting consumer demands for high-quality, affordable services. Regulatory stability, coupled with a healthy competitive environment, is essential for creating an atmosphere conducive to innovation and continued growth in Chile's telecom industry.

Key Market Trends

5G Network Expansion

A key market trend shaping the Chilean telecom industry is the rapid expansion of 5G networks. The rollout of 5G technology in Chile is expected to bring revolutionary changes to the telecom sector by offering ultra-fast internet speeds, low latency, and enhanced connectivity. Telecom operators in Chile, such as Movistar, Entel, and Claro, have already begun investing in 5G infrastructure, particularly in major urban areas like Santiago, Valparaíso, and Concepción. This transition is not only transforming consumer experiences but also paving the way for new technologies, applications, and business models.

The introduction of 5G will enable faster and more reliable mobile internet, which is essential as the demand for data-intensive services such as video streaming, online gaming, and cloud computing continues to grow. Additionally, 5G will provide the

bandwidth required for emerging technologies like Internet of Things (IoT) devices, smart cities, autonomous vehicles, and augmented reality (AR). In a country like Chile, which has vast geographical regions, 5G technology also promises to improve connectivity in underserved and remote areas, which have traditionally struggled with slower internet speeds due to challenging terrain.

The Chilean government is supportive of 5G adoption, having already auctioned the necessary spectrum to telecom operators, ensuring the necessary infrastructure to meet future demands. However, the rollout is a complex and expensive process, requiring significant investment in both fiber-optic networks and mobile towers. As competition among telecom providers intensifies, 5G technology is also expected to become a key differentiator for companies seeking to attract new customers and improve service quality.

The success of 5G will depend not only on infrastructure but also on consumer adoption. With the growing number of smartphone users and an increasing preference for high-speed mobile internet, Chile is poised to become a leader in the Latin American 5G landscape, contributing significantly to economic development and technological innovation in the region.

Growing Demand for Data and Digital Services

Another prominent trend in the Chilean telecom market is the growing demand for data and digital services. This trend is driven by several factors, including the increasing adoption of smartphones, the proliferation of internet-connected devices, and the shift toward remote work and digital entertainment. As Chile's economy becomes more digitized, the need for faster, more reliable internet is becoming increasingly critical.

With a higher number of mobile and internet users, Chile has seen a sharp rise in data consumption. Consumers are streaming more high-definition video, engaging in online gaming, and using cloud services for personal and business purposes. According to industry reports, mobile data consumption has grown substantially over the past few years, with more than 85% of Chileans having access to mobile phones, most of which are equipped with internet capabilities. Telecom providers are responding by investing in faster mobile networks and expanding broadband services to keep up with consumer demand.

This surge in data usage has spurred the growth of fiber-optic broadband as a preferred solution for homes and businesses. Fiber-optic internet offers superior speed,

bandwidth, and reliability compared to traditional copper lines, making it an ideal choice for high-data-demand activities such as telecommuting, video conferencing, and streaming. Telecom operators in Chile are heavily investing in expanding their fiber-optic networks, targeting both urban and rural areas to improve connectivity and offer more comprehensive services.

Digital transformation is driving demand for a variety of services beyond traditional telecom offerings. Businesses are increasingly adopting cloud computing, IoT, cybersecurity, and enterprise networking solutions to stay competitive. Telecom providers are capitalizing on this trend by offering more diverse packages, including cloud services, smart home solutions, and digital entertainment platforms, to cater to both individual consumers and business clients.

As data-driven services become more integral to daily life in Chile, telecom companies must continue to innovate and upgrade their infrastructure to meet the growing demand for data while ensuring affordable and reliable service delivery.

Convergence of Telecom and Entertainment Services

A notable trend in the Chilean telecom market is the convergence of telecom and entertainment services. Telecom operators are increasingly bundling their core offerings—such as mobile phone plans, broadband internet, and fixed-line services—with digital entertainment options like television, video streaming, and gaming. This trend is fueled by consumer demand for all-in-one packages that provide seamless access to various forms of entertainment and communication through a single subscription.

The growth of video streaming services, particularly platforms like Netflix, YouTube, HBO Max, and local Chilean content providers, has changed the way consumers access entertainment. In response, telecom companies are offering bundled plans that include high-speed internet with subscription television or streaming services. This convergence not only enhances the value proposition for consumers but also helps telecom providers lock in customers and increase retention rates by offering a diversified service portfolio.

Chile's large urban population, with high internet penetration rates, is particularly receptive to these bundled packages, which allow them to manage all their entertainment and communication needs under one roof. Telecom companies are investing in content partnerships with global and regional streaming platforms to offer exclusive content or more competitive pricing on subscription services. This trend has

been especially popular among younger, tech-savvy consumers who seek flexible and cost-effective solutions for their communication and entertainment needs.

Telecom operators are also taking a more active role in the content creation space, offering over-the-top (OTT) platforms and original programming. This shift represents a new avenue for revenue generation, as telecom companies explore new business models beyond traditional connectivity services. By tapping into the growing demand for digital entertainment, telecom providers are positioning themselves as more than just service providers, but as integral players in the evolving digital ecosystem.

The convergence trend is set to accelerate in Chile as telecom operators continue to innovate their service offerings and adapt to the increasing demand for seamless digital experiences. As more consumers turn to bundled services, competition in the telecom market will intensify, pushing companies to continuously enhance their product portfolios.

Segmental Insights

Service Insights

The Mobile held the largest market share in 2023. Mobile services dominated the Chile telecom market due to several factors, primarily the widespread adoption of smartphones and the increasing reliance on mobile data for communication, entertainment, and work. Mobile phones are deeply integrated into daily life, with more than 85% of Chileans owning a mobile device, many of which are smartphones with internet access. This high penetration rate makes mobile services the go-to option for most Chileans, particularly in a country with diverse geographical features where infrastructure for fixed-line services is harder to implement, especially in rural areas. Moreover, mobile operators in Chile have heavily invested in expanding 4G and 5G networks, improving coverage and data speeds across urban and rural areas. These investments have further fueled the demand for mobile data, as consumers increasingly rely on mobile apps, video streaming, social media, and cloud services.

Mobile services also offer flexibility and affordability, making them more accessible to a broader demographic, including low-income households. With the shift toward remote work and online learning, mobile internet has become an essential tool for staying connected.

While fixed broadband is growing, particularly in urban areas, the convenience, mobility,

and broader reach of mobile services continue to make them the dominant force in the Chile telecom market. This trend is expected to persist as mobile technologies evolve and data consumption continues to rise.

Regional Insights

Santiago Metropolitan Region held the largest market share in 2023. The Santiago Metropolitan Region dominates the Chile telecom market due to several key factors, primarily its economic importance, population density, and technological infrastructure. As the country's capital, Santiago is the central hub for commerce, industry, and government, making it the focal point for telecom services. The region houses over 40% of Chile's total population, leading to a higher concentration of consumers demanding mobile, broadband, and digital services. In addition to its population size, Santiago boasts the most advanced telecom infrastructure in the country. Major telecom providers, such as Movistar, Entel, and Claro, focus a significant portion of their investments in this region to meet the demand for high-speed internet, 5G networks, and fiber-optic broadband. The dense urban landscape allows for easier deployment of telecom infrastructure like fiber-optic cables and mobile towers, which further enhances connectivity.

Santiago also benefits from being the epicenter of digital transformation in Chile, with higher adoption rates of smartphones, streaming services, and e-commerce. As businesses and consumers increasingly rely on digital platforms, telecom operators continue to prioritize Santiago for the latest technological upgrades and service offerings, contributing to its dominance in the market. Overall, Santiago's economic, demographic, and technological advantages make it the driving force of Chile's telecom industry.

Key Market Players

AT&T Inc.

Verizon Communications Inc.

SK Telecom Inc.

Telstra Group Limited

Deutsche Telekom AG

NTT Group

Telefonica S.A.

KDDI Corporation

Report Scope:

In this report, the Chile Telecom Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Chile Telecom Market, By Service Type:

Mobile

Fixed Data

Chile Telecom Market, By Technology:

2G

3G

4G

5G

Wi-Fi

Fiber-optic

Chile Telecom Market, By End User:

Residential

Enterprise

Government

Chile Telecom Market, By Company Size:

Small & Medium-Sized Enterprises (SMEs)

Large Enterprises

Chile Telecom Market, By Business Model:

Mobile network operators (MNOs)

Fixed-line operators (FLOs)

Internet service providers (ISPs)

Over-the-top (OTT)

Chile Telecom Market, By Region:

Arica and Parinacota Region

Tarapac? Region

Antofagasta Region

Atacama Region

Santiago Metropolitan Region

Rest of Chile

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Chile Telecom Market.

Available Customizations:

Chile Telecom Market, By Service Type (Mobile, Fixed Data), By Technology (2G, 3G, 4G, 5G, Wi-Fi, Fiber-optic)...

Chile Telecom Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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