Colombia: New Convergent Service Offerings Heat Up Competition the Fixed Communications Market

Description: Summary

With a revenue of $7.2bn in 2016, or 2.5% of GDP, the telecom services market in Colombia was the fifth largest in Latin America, behind Brazil, Mexico, Argentina and Venezuela. Between 2016 and 2021, Pyramid Research expects Colombia to be one of the fastest-growing telecom and pay-TV markets in the region, expanding at a CAGR of 4.0%, behind Mexico, Uruguay and Bolivia.

Growth will be supported by the increasing demand for both fixed and mobile data connectivity services, as well as operators' ongoing investment efforts to roll out 4G/LTE, FTTH and cable networks across the country. Ongoing public initiatives, such as the Vive Digital Plan II, will also be key to support growth in the fixed and mobile data connectivity segments, particularly in rural and remote parts of the country.

Key Findings

- Between 2016 and 2021, Pyramid Research expects Colombia to be one of the fastest-growing telecom and pay-TV markets in the region, expanding at a CAGR of 4.0% behind Mexico, Uruguay and Bolivia.
- Telecom and pay-TV revenue growth in Colombia will be supported by the increasing demand for both fixed and mobile data connectivity services, as well as operators' ongoing investment efforts to roll out 4G/LTE, FTTH and cable networks across the country. Ongoing public initiatives such as the Vive Digital Plan II will be also key to support growth in the fixed and mobile data connectivity segments, particularly in rural and remote parts of the country.
- Colombia continues to be one of the most competitive fixed communications markets in Latin America: Claro is the leading provider of the fixed broadband segment, followed by UNE and Telefónica. In order reduce customer churn and increase overall ARPU levels in the fixed residential segment, operators in Colombia have been increasing their focus on the promotion of double- and triple-play packages, including different combinations of fixed voice, broadband and pay-TV services.
- Despite cable traditionally being the most widely adopted pay-TV technology in Colombia, over the past five years, this technology has been losing track to DTH/satellite and IPTV options, a trend we expect to continue in the coming years.

Synopsis

"Colombia: New Convergent Service Offerings Heat Up Competition in the Fixed Communications Market" a new Country Intelligence Report by Pyramid Research, provides an executive-level overview of the telecommunications market in Colombia today, with detailed forecasts of key indicators up to 2021. Published annually, the report provides detailed analysis of the near-term opportunities, competitive dynamics and evolution of demand by service type and technology/platform across the fixed telephony, broadband, mobile and pay-TV sectors, as well as a review of key regulatory trends.

The Country Intelligence Report provides in-depth analysis of the following:

- Regional context: telecom market size and trends in Colombia compared with other countries in the region.
- Economic, demographic and political context in Colombia.
- The regulatory environment and trends: a review of the regulatory setting and agenda for the next 18-24 months as well as relevant developments pertaining to spectrum licensing, national broadband plans, number portability and more.
- A demand profile: analysis as well as historical figures and forecasts of service revenue from the fixed telephony (including VoIP), broadband, mobile voice, mobile data and pay-TV markets.
- Service evolution: a look at changes in the breakdown of overall revenue between the fixed/pay-TV and mobile sectors and between voice, data and video from 2016 to 2021.
- The competitive landscape: an examination of key trends in competition and in the performance, revenue market shares and expected moves of service providers over the next 18-24 months.
- In-depth sector analysis of fixed telephony, broadband, mobile voice, mobile data and pay-TV services: a quantitative analysis of service adoption trends by network technology and by operator, as well as of...
average revenue per line/subscription and service revenue through the end of the forecast period.

- Main opportunities: this section details the near-term opportunities for operators, vendors and investors in Colombia's telecommunications and pay-TV markets.

Reasons to Buy

- This Country Intelligence Report offers a thorough, forward-looking analysis of Colombia's telecommunications and pay-TV markets, service providers and key opportunities in a concise format to help executives build proactive and profitable growth strategies.
- Accompanying Pyramid Research's Forecast products, the report examines the assumptions and drivers behind ongoing and upcoming trends in Colombia's mobile communications, fixed telephony/VoIP, broadband and pay-TV markets, including the evolution of service provider market shares.
- With more than 20 charts and tables, the report is designed for an executive-level audience, boasting presentation quality.
- The report provides an easily digestible market assessment for decision-makers built around in-depth information gathered from local market players, which enables executives to quickly get up to speed with the current and emerging trends in Colombia's telecommunications and pay-TV markets.
- The broad perspective of the report coupled with comprehensive, actionable detail will help operators, equipment vendors and other telecom industry players succeed in the challenging telecommunications market in Colombia.

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