Mexico - Mobile Infrastructure, Broadband, Operators - Statistics and Analyses

Description: The Mexican mobile market is undergoing considerable changes in the wake of efforts to curb the market dominance of Telcel, the entry of AT&T Mexico following its acquisition of Nextel Mexico and Iusacell, and the greater competitive role being played by MVNOs. Telcel still accounts for about 66% of the market by subscribers, though it is in the process of selling assets to reduce its share to below 50% in line with government legislation passed in late 2013. The regulator has also endeavoured to encourage competition since 2010, partly through issuing additional spectrum which encourages the entry of new players. The MVNO sector is slowly making gains, but still accounts for only about 1% of the market.

Despite efforts to encourage greater competition in the market, only AT&T Mexico and Telcel were eligible to bid for AWS licences at auction in February 2016. These concessions, which expire in late 2030, will improve the ability of these operators to offer mobile data services nationally, and extend mobile broadband services into rural areas.

In January 2017 the Altan consortium was contracted to manage a wholesale mobile network for 20 years, aimed at delivering mobile voice and data to underserved areas. The network is to be made available for use from March 2018. Separately, the regulator February 2017 published a plan to auction up to 130MHz of spectrum in the 2.5GHz band later in the year, geared to improving mobile broadband services.

This report provides an overview of Mexico's mobile market, including a range statistical data as well as subscriber forecasts to 2021.

Key Developments:

Regulator allows América Móvil to acquire an additional 60MHz of spectrum in the 2.5GHz band from Grupo MVS; Nokia contracted to design, build and operate the wholesale Red Compartida network in five regions; Telcel sells assets in eastern and northern areas; Movistar signs national roaming deal with Telcel; Telcel and AT&T Mexico secure AWS spectrum licences at auction; regulator issues plan for auction of 2.5GHz spectrum expected in Q3 2017; Telesites set up to manage América Móvil's domestic tower business; Altan consortium selected to operate the nationwide wholesale mobile network using 700MHz band spectrum; Grupo Comercial Chedraui signs MVNO deal with Movistar; Movistar to invest MXN3 billion to expand LTE to 300 cities by 2018; payments processor PROSA teams up with Gemalto to provide m-payment services; government reduces investment in state-owned shared mobile network from $10 billion to $7 billion; América Móvil develops m-payment platform with banks; report update includes the regulator’s market data updates to June 2016, telcos' financial and operating data to Q4 2016, recent market developments.

Companies mentioned in this report:

Telcel (América Móvil), AT&T Mexico (Iusacell, Nextel Mexico), Movistar (Telefónica Mexico), Televisa, Globalstar, Unefón, Virgin Mobile, Weex, AT&T Mexico.
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