



Latin America Telecommunication Market Report, 2010-2011

Aug. 2011

This report

- ◆ **Analyzes overall telecommunication industry in Latin America.**
- ◆ **Highlights the competition, policy supervision, development strategy and major operators of telecommunication industry in Brazil, Mexico, Argentina, Columbia, Venezuela, Chile, and Central America, as well as other Latin American Countries .**

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Abstract

Latin America is a potential market with a population and GNP over 580 million and USD2.3 trillion respectively. Telecommunication industry has started reformation since 1980s and gradually realized privatization in Latin America. With the enhanced degree of privatization and economic recovery in Latin America, major telecom operators in this region (most of them are multinational corporations) have expanded investment since 2005.

Growth rate of mobile phone in Latin America exceeded 10% in 2010, however, the rates varied from country to country. As of 2010, penetration rate of mobile phone in Brazil and Argentina was 104% and 140% respectively, whereas that of Cuba was merely 10%.

Due to historical reasons, countries in Latin America used to be colonies of Spain and Portugal, and are mainly Spanish-speaking and Portuguese-speaking countries. Local telecom operators of Latin American countries are generally weak, America Mobil, Telefonica and Telecom Itlia, three major operators with Spanish and Portuguese background and strong capital strength, occupy more than 80% telecom market share in Latin America, wherein Telefonica is the largest operator in Latin America. Influenced by European market, GSM is the most used system in South America; meanwhile, CDMA system dominates the markets in Mexico and Caribbean area affected by US market.

Subscribers of Telecom Services in Latin America, 2004-2010 (Unit: 1,000)

| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | Growth Rate of 2009 | 2010 |
|-----------------------|---------|---------|---------|---------|---------|---------|---------------------|---------|
| Mobile Subscriber | 168,686 | 233,267 | 298,157 | 353,431 | 439,140 | 491,575 | 11.90% | 544,000 |
| Fixed-line Subscriber | 91,234 | 93,992 | 97,171 | 94,572 | 102,173 | 102,194 | 0.00% | - |
| Broadband | 4,933 | 8,333 | 12,844 | 22,057 | 29,582 | 36,935 | 24.90% | - |

Subscribers of Telecom Services of Telefónica Group, 2006-2010 (Unit: 1,000)

| | 2006 | 2007 | 2008 | 2009 | 2010 | Growth Rate of 2010 |
|-----------------------|---------|---------|---------|---------|---------|---------------------|
| Mobile Subscriber | 145,125 | 167,781 | 195,819 | 202,333 | 220,241 | 8.90% |
| Fixed-line Subscriber | 42,341 | 43,434 | 42,931 | 40,606 | 41,356 | 1.80% |
| Broadband | 7,352 | 10,320 | 12,472 | 13,493 | 17,130 | 27.00% |
| Pay-TV | 1,064 | 1,748 | 2,268 | 2,489 | 2,787 | 12.00% |

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