

4G Networks Paraguay Market to reach \$992 million with 3.1% CAGR Technology and Forecast to 2021

4G Networks Paraguay Market \$992 million Growth, Technology and Markets 2021

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Summary

“Paraguay: Recently Deployed 4G Networks and a New Fiber Backbone Will Drive Revenue Growth Through 2021,” a new Country Intelligence Report by Pyramid Research, offers a precise, incisive profile of Paraguay’s mobile and fixed

telecommunications and pay-TV markets based on comprehensive proprietary data and insights from our research in the Paraguayan market. Published annually, this presentation-quality, executive-level 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 and broadband, mobile and pay-TV sectors, in addition to a review of key regulatory trends.

Key Findings

- Paraguay is one of the smallest telecom services markets in Latin America, generating an estimated \$992m in 2016. In 2016 revenue will drop 7% relative to 2015, but this is due largely to adverse exchange rate movements — in local currency terms, revenue will grow 2.4% in 2016.

- Pyramid Research expects overall service revenue to grow at a 3.1% CAGR from 2016 to 2021, driven not only by solid growth in the pay-TV market but, more importantly, by growth in the mobile data and fixed broadband services markets. Despite the fixed segment increasing its revenue participation by several percentage points during the 2016-2021 period, the mobile segment will remain dominant, accounting for more than 70% of all the telecom and pay-TV revenue generated during 2021.

- Tigo is Paraguay’s largest revenue generator, providing mobile, fixed broadband and pay-TV services across the country. Together with No. 2 player Personal, both will account for three-fourths of the total market revenue for 2016. Despite this advantage, the increasing deployment of 4G services is opening new opportunities for smaller players across the mobile communications segment.

- We expect 3G connections will overtake 2G as soon as 2017. The availability of LTE networks and



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devices has accelerated following the 4G spectrum auction in December 2015. We expect the number of LTE subscriptions to expand at a CAGR of 26.6% between 2016 and 2021.

- We expect that the total number of fixed access lines in the country will continue increasing through 2021, driven by a strong uptake in cable broadband connections and the ongoing rollout of a national fiber backbone network, connecting all municipalities in the country by year-end 2016.

Synopsis

“Paraguay: Recently-Deployed 4G Networks and a New Fiber Backbone Will Drive Revenue Growth Through 2021” provides an executive-level overview of the telecommunications market in Paraguay today, with detailed forecasts of key indicators up to 2020. It delivers deep quantitative and qualitative insight into Paraguay’s telecom market, analyzing key trends, evaluating near-term opportunities and assessing risk factors, based on proprietary data from Pyramid Research’s databases.

It provides in-depth analysis of the following:

- Paraguay in a regional context; a comparative review of market size and trends with that of other countries in the region.
- Economic, demographic and political context in Paraguay.
- 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 forecasts and historical figures of service revenue from fixed telephony (including VoIP), broadband, mobile voice and data, and pay-TV markets.
- The service evolution; a look at the change in the breakdown of overall revenue by fixed/pay-TV and mobile sectors and by voice, data and video in the current year as well as the end of the forecast period.
- The competitive landscape; an examination of key trends in competition and service providers’ performance, revenue market shares and expected moves over the next 18-24 months.
- An in-depth sector analysis of fixed telephony and broadband services, mobile voice and data services, and pay-TV services; a quantitative analysis of service adoption trends by technology/platform as well as operator, 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 Paraguay’s telecommunications and pay-TV markets.

Reasons to Buy

- This Country Intelligence Report helps executives build proactive, profitable growth strategies by offering comprehensive, relevant analysis of Paraguay’s telecommunications and pay-TV markets based on insights directly from the local market players.
- The report offers a wealth of data on the telecom and pay-TV markets, with the mobile and fixed segments examined in detail.
- The competitive landscape and the major players are given extra attention, enabling local players or prospective market entrants to gain the insight they need.
- The broad but detailed perspective will help operators, equipment vendors and other telecom industry players to succeed in the challenging telecommunications market in Paraguay.
- The report is designed for an executive-level audience, boasting presentation quality that allows it to be turned into presentable material immediately.
- The report concludes with an exploration of the opportunities available in the Paraguayan market to operators, vendors and investors.

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