

# Puerto Rico - Telecoms, Mobile, Broadband and Digital Media –Key Statistics, In Depth Analysis and Forecast to 2022

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## Executive summary

Sprint and Open Wireless agree to combine their mobile businesses Puerto Rico has one of the highest mobile penetration rates in the Latin American and the Caribbean region, at about 160%. However, although it is a US territory it lags well behind the mainland US states in terms of fixed-line and broadband penetration. This is partly due to a continuing economic recession, high unemployment rates (and consequently low disposable income) and poor telecoms investment in a market largely dominated by the incumbent Puerto Rico Telephone Company. The activities of the US-based telcos, including T-Mobile US, Sprint and AT&T continue to impact on the Puerto Rican market. This has recently been seen in these operators securing spectrum in the 600MHz, which included licences covering the island.

The Puerto Rico Telephone Company’s fixed-line market dominance was augmented following its acquisition by the largest wireless company in Latin America, América Móvil. In contrast, with six network operators, the mobile (cellular/wireless) market has been experiencing more robust competition and growth. Although América Móvil’s Claro briefly took the lead from AT&T Mobility in terms of subscriber numbers, AT&T regained the top position following its acquisition of Centennial Communications. In early 2017 Sprint and Open Wireless agreed to merge their networks in a bid to offer better market competition by increasing their scale and spectrum holdings.

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With emerging VoIP and videostreaming sectors and steadily a growing broadband market, as well as satellite TV services (which have caused a decline in the cable TV subscriber base in recent years), the growth and convergence of digital media looks promising. The acquisition by Liberty Global of the remaining cable TV operator Choice Cable, completed in mid-2015, has created a monopoly player in this sector. Liberty Cablevisión, now part of Liberty Global's LiLAC Group, is in a stronger position to capitalise on scale, and so provide improved services based on greater investment in technologies, including the anticipated DOCSIS3.1 standard.

#### Key developments:

Sprint and Open Wireless agree to combine their mobile businesses; Liberty Global completes integration of Choice Cable, becoming a monopoly provider of cable TV and broadband services, contacts ADTRAN to provide a 1Gb/s service; Senate debates legislation aimed at preventing government agencies from providing telecom services; Cablevisión has Lifeline Broadband Provider (LBP) status revoked; Sprint phases out consumer wireline business and services; AT&T delivers 90% population coverage with LTE; DISH and Claro offer joint quad-play services; government-funded Gigabit Island project aiming to provide access speeds of 1Gb/s to 70% of premises by 2020; T-Mobile US expands LTE services; Claro launches videostreaming; report update includes the regulator's market data to December 2016, telcos' operating and financial data to Q4 2016, recent market developments.

#### Companies mentioned in this report:

Puerto Rico Telephone Company, América Móvil, AT&T, Liberty Cablevision; OneLink Communications; T-Mobile; Open Mobile; Sprint PCS; Choice Cable.

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