15 YEARS OF
TELECOMMUNICATIONS
SECTOR STATISTICS

COSTA RICA
2024

sutel
SUPERINTENDENCIA DE
TELECOMUNICACIONES

SPECIAL EDITION

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INTRODUCTION

The year 2024 marked 15 years since the formulation of telecommunications sector statistics began, reaffirming SUTEL's commitment to generating clear, useful, and high-quality information for the country. The evolution recorded during this period reflects the sector's dynamism and its capacity for adaptation, innovation, growth, and similarities with other more developed international markets. As a result of the continuous work of collecting, analyzing, and publishing data, today we have a solid and reliable technical tool that is internationally recognized, allowing us to monitor the dynamics of telecommunications services, promote transparency, and strengthen proactive, evidence-based regulation in the face of the challenges of the coming years.

In 2024, most telecommunications services in Costa Rica were consolidated. During this period, there were 177 licensed operators and service providers. This reflects a period of growth and commercial transformation marked by more competitive offerings and increasingly demanding users.

With regard to subscription trends in 2024, mobile telephone service reached 6,977,935 active lines, representing a 2.4 % increase over 2023. In terms of payment methods for these services, during the period from 2010 to 2013, prepaid increased its share to 80 % of subscriptions, and from 2014 onwards it began to lose ground, to the point that by 2024 postpaid closed at 49 %. This trend is consistent with the behavior of more developed markets worldwide.

In terms of fixed Internet access service, in December 2010 there were a total of 382,161 subscriptions, and 15 years later this figure has tripled, reaching 1,194,638 subscriptions in December 2024. With regard to mobile Internet access services, there were 5,315,598 subscriptions in 2024.

Service bundling continues to be a key trend in consumption. In 2024, 58 % of fixed Internet subscriptions were bundled, as were 79 % of VoIP telephone subscriptions and 75 % of pay television subscriptions. The most popular package was the double play of fixed Internet and television (69 %), followed by the triple play that includes VoIP (21 %).

The sector's revenue performance also shows growth signs. In 2024, ₡781,237 million was generated, representing a nominal increase of 6.9 % over the previous year.

Internet access service (mobile and fixed) is consolidated as the main source of revenue with

₡524,108 million in 2024, representing an 8.9 % increase over the previous year and an average annual growth rate of 5.31 % in the 2020-2024 period. In relation to fixed telephone service, revenues reached ₡31,397 million, representing an increase of 8 % compared to 2023. This change is due to the rate adjustment approved by SUTEL in 2023.

Analysis of telecommunications sector revenues allows us to establish two scenarios according to network type: in the first, the mobile network (telephony + mobile Internet access) represents 63 % of the total, followed by the fixed network (fixed Internet 28 %, dedicated lines 5 %, and fixed telephony 4 %), which represents 37 %.

In terms of infrastructure, the expansion of the fiber optic network showed sustained progress, with 112,796 kilometers installed by 2024, representing a 6.3 % increase over the previous year.

Regarding quality indicators in 2024, the download speed of Internet access services through fixed networks stands out, with a national average result of over 90 % for the four operators evaluated in this report: Kölbi, Liberty, Telecable, and Tigo, showing that, on average, the actual speed received by users is above the established thresholds.

In mobile networks during 2024, the percentage of time that users remained connected to 4G technology remained high for operators Claro and Liberty, with values of 90 % and 87 %, respectively, while the state-owned operator Kölbi averaged 70 %. This is a representative indicator of the quality of service experienced by mobile service users.

Over the 15 years of industry statistics, this information has played a key role in closing the digital divide in Costa Rica, through its use in decision-making for programs and projects aimed at expanding access and equity in services. In line with the objectives established by the General Telecommunications Act, No. 8642, and the priorities defined in the three National Telecommunications Development Plans (PNDT 2009-2014, PNDT 2015-2021, and PNDT 2022-2027), a significant complement to the market has been achieved through the implementation of the five programs of the National Telecommunications Fund (FONATEL).

On the other hand, during 2024, there was an increase in the number of concentrations notified to SUTEL. This change could be reflecting the maturity of the market. As the sector evolves, operators consolidate their positions and seek growth strategies that include vertical and horizontal integration, the acquisition

of competitors or complementary services such as data centers and business solutions. The latter allow companies to respond more quickly to digital transformation, achieve economies of scale, and effectively address the competitive challenges posed by the entry of new players in the digital environment and users' growing expectations for integrated solutions.

This behavior is characteristic of sectors that have passed the initial stages of rapid expansion and where market players must increase their efficiency, reduce costs, access new technologies, or respond to changes in consumer demand and preferences.

These 15 years of statistics confirm the transformation and consolidation of a sector that has been exposed to a series of challenges from digital players, the continuous increase in data consumption, and the constant need to invest in new technologies. Against this global backdrop, Costa Rica is no exception, and market operators and providers have also responded with consolidation strategies to address new challenges and provide more and better benefits to end users.

Federico Chacón Loaiza
Chairman of the Board

METHODOLOGY
AND SCOPE OF THE REPORT

# DESCRIPTION OF TELECOMMUNICATION SERVICES INCLUDED IN THIS REPORT

In an effort to standardize and simplify the way market information is collected from service providers and network operators, publicly available telecommunications services have been divided based on the characteristics of the network deployed and the type of signal they carry. Additionally, this classification is in line with the existing nomenclature for the granting of authorizations[1] and other services enabled via license.

In view of the above, the services included in this report are broken down into three main categories, namely: voice services, data transfer services, and pay TV services. This classification and the subgroups included in each case are illustrated in Figure No. 1.

The services provided through networks for voice transmission include the following:

- **Mobile telephony services:** a service where users have two potential payment options available: prepaid and postpaid subscriptions.

- **Fixed telephony services:** this service is outlined and defined in article 3 of the Regulation on the Telecommunications Service End User Protection Regime. For the purposes of this report, fixed telephony is further subdivided into three different types of services: Plain Old Telephone Services (POTS), VoIP or IP telephony services, and public telephony services. Article 3 of the aforementioned regulation stipulates that the provision of fixed telephony services shall include all types of access technologies, provided that the associated terminals do not support terminal mobility.

FIGURE 1. General classification of services
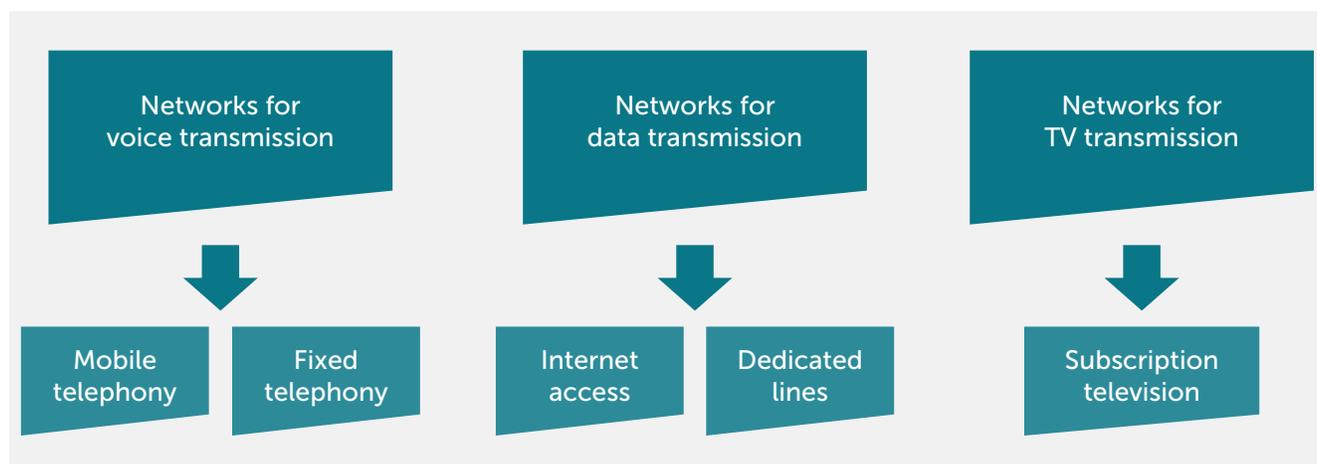
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

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1   Resolution No. 9869 SUTEL-SCS-2028, RCS-374-2018: "Requirements for the processing of applications for the authorization and extension of Licenses to operate networks and provide telecommunication services to the public, and for the notices of service expansion and coverage areas". https://www.sutel.go.cr/sites/default/files/rcs-374-2018_requisitos_para_autorizaciones_prorrogas_ampliaciones_de_th_1.pdf

The data transfer service is outlined and defined in article 8, paragraph 75, of the Service Provision and Quality Regulations (RPCS as per its acronym in Spanish) and, for the purposes of this report, is further subdivided into the following two categories:

- **Internet services:** A service offered by an Internet Service Provider (ISP), whereby subscribers are provided the necessary means to connect their computer equipment to the Internet.

- **Dedicated line services:** This service is defined as the transfer of data between two or more access points that are separated geographically. This data is transmitted via wired networks.

Lastly, while television content itself is not considered a telecommunication service (content), TV broadcast networks are included in this report since they are a means of offering telecommunication services over the Internet. This category includes:

- **Pay TV subscriptions:** Satellite television, cable television, IPTV and MMDS television.

Table 1 further describes the merchandising methods and characteristics of the networks that support each of the services included in these three subgroups:

TABLE 1. Telecommunication services included in this report

Category of telecommunication service	Forms in which the service is marketed	Characteristics of supported networks
Mobile telephony	Text messaging (SMS), postpaid voice, prepaid voice.	Enables voice communication over wireless media. Consumer trends show a shift towards an all-IP architecture.
Fixed telephony	Plain old telephone service (POTS), Integrated Services Digital Network (ISDN), Voice over Internet Protocol (VoIP).	Commonly known as a Public Switched Telephone Network (PSTN), it uses a set of information exchange centers and trunk links to establish temporary connections between two endpoints, otherwise known as circuit switching. Moreover, with the implementation of a softswitch and other active elements, the PSTN can be interlinked to any data network and provide Voice over IP.
Pay television	Satellite television, cable television, IPTV and MMDS television.	These services are provided over a variety of different technologies, such as satellite or cable systems supported by DOCSIS 2.0 and higher. They are characterized by the transmission and/or retransmission of television and audio signals to a group of users under a subscriber contract with the provider, and who compensate said provider monetarily. This requires a *Head-End Device*[1] for wired transmission, or a satellite station for wireless transmission, and give users access[2]. This network, which was mainly established for the provision of television services or subscription-based content, can also transmit data. For this reason, while it may not be a telecommunications service, it is worth analyzing its evolution.

[1] Head-End Device: the head-end of a telecommunications network is where the programming is gathered and the distribution network begins. Signals are typically received via satellite, broadcast stations, or even the Internet, and made available for distribution.

[2] Users, subscribers, or customers may be residential or commercial.

Category of telecommunication service	Forms in which the service is marketed	Characteristics of supported networks
Data transfer	Wholesale data transfer	This refers to an operator of a telecommunications network that has the ability to carry data from other third-party operators or providers. In other words, the final services are provided by other providers, given that this carrier leases a logical or physical connection from the network it manages, so that other providers can provide telecommunications services to their end users.
	Internet access	A service offered by an Internet Service Provider (ISP), whereby subscribers are provided the necessary means to connect their computer equipment to the Internet.
	Wireless end-to-end links	This service is defined as the transfer of data between two or more access points that are separated geographically. The network through which the data is transfered is wireless.
	Leased lines	The transfer of data between two or more access points that are separated geographically. The network through which the data is transfered is wireless.
	Virtual Private Network (VPN)	A service in which a private data network is created using public telecommunications infrastructure, where the data is kept secure through different security and routing technologies.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

The authorized services not covered in this report are the following: geolocation, videoconferencing, and trunking. This is because these services require a license for radio spectrum frequencies for private commercial use, meaning that the telecommunications network used to provide these services is private in nature and is not interconnected with public telecommunication networks. As such, these services are not considered to be available to the general public.

METHODOLOGY

With the purpose of compiling the 2024 key performance indicators of the Costa Rican telecommunication sector, the individual processes developed by the General Directorate of Markets, the General Directorate of Competition, the General Directorate of Quality, and the General Directorate of FONATEL, have been unified –on the basis of the methods of application for each of the aforementioned categories– in order to determine the sector's general performance indicators (market behavior), the quality of the services provided, and the quality of FONATEL operations and projects.

Methodology applied to market behavior indicators

On the subject of the market behavior indicators of the telecommunication sector, the General Directorate of Markets is responsible for the data gathering process, which itself is carried out in three distinct phases, to wit: (i) data collection; (ii) review and analysis; and (iii) calculation of results.

The diagrams presented below provide a summary of the main tasks to be performed in each of these three phases.

FIGURE 2. Data gathering process (collection, review and analysis, and preparation of indicators) of the Telecommunication Sector

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.
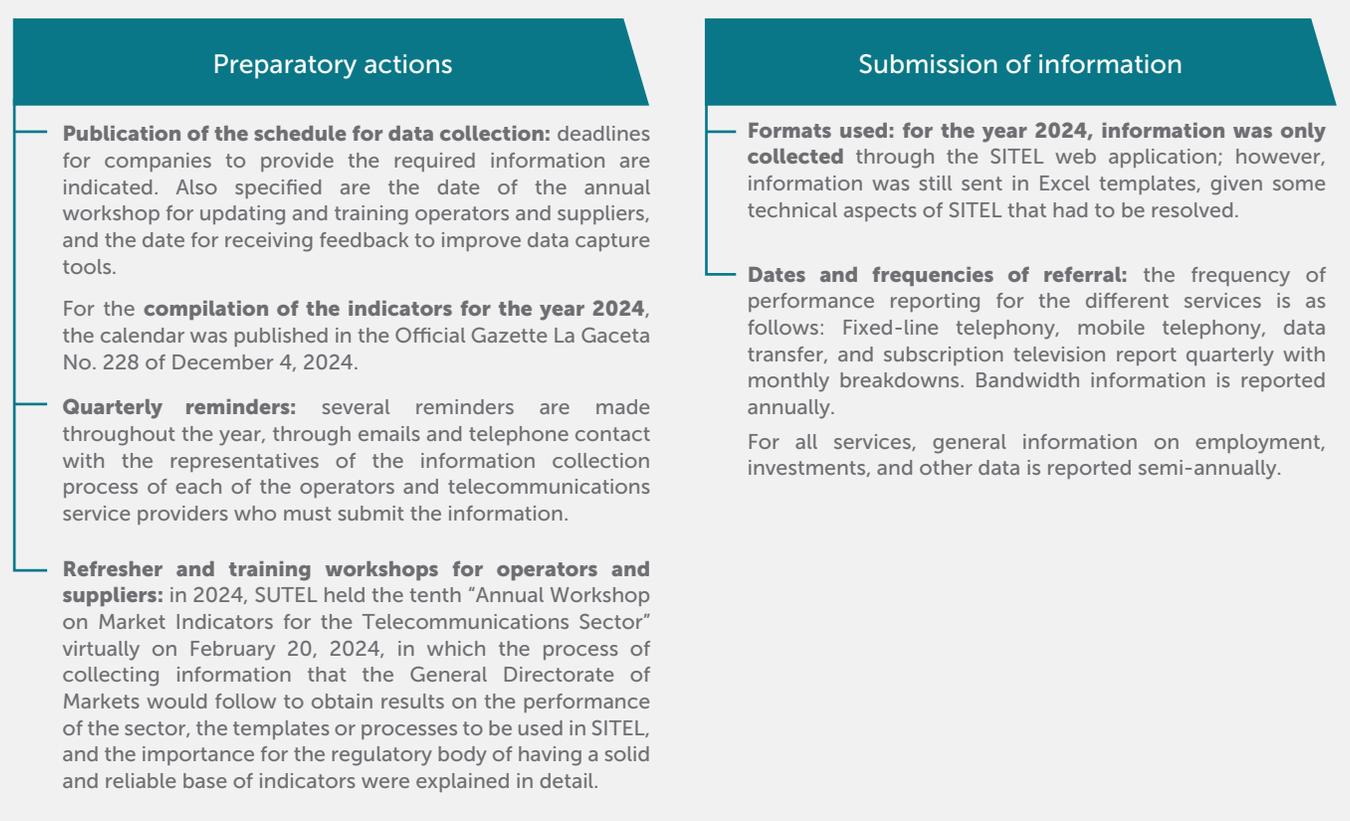
Data collection

Data collection is processed via the Telecommunication Indicators System (SITEL[2] as per its acronym in Spanish). The information is entered by each operator via a web portal that enables and streamlines data submission and report generation. It is worth mentioning that the information shared by each network operator and/or service provider is considered to be an affidavit in relation to the reported service that they provide.

Year after year, with the purpose of guaranteeing the quality of the information gathered and shared by the companies in this sector, an annual workshop is organized and held to onboard and train the

FIGURE 3. Data gathering process for the compiling and construction of the Telecommunication Sector's indicators

Preparatory actions

Publication of the schedule for data collection: deadlines for companies to provide the required information are indicated. Also specified are the date of the annual workshop for updating and training operators and suppliers, and the date for receiving feedback to improve data capture tools.

For the **compilation of the indicators for the year 2024**, the calendar was published in the Official Gazette La Gaceta No. 228 of December 4, 2024.

Quarterly reminders: several reminders are made throughout the year, through emails and telephone contact with the representatives of the information collection process of each of the operators and telecommunications service providers who must submit the information.

Refresher and training workshops for operators and suppliers: in 2024, SUTEL held the tenth "Annual Workshop on Market Indicators for the Telecommunications Sector" virtually on February 20, 2024, in which the process of collecting information that the General Directorate of Markets would follow to obtain results on the performance of the sector, the templates or processes to be used in SITEL, and the importance for the regulatory body of having a solid and reliable base of indicators were explained in detail.

Submission of information

Formats used: for the year 2024, information was only collected through the SITEL web application; however, information was still sent in Excel templates, given some technical aspects of SITEL that had to be resolved.

Dates and frequencies of referral: the frequency of performance reporting for the different services is as follows: Fixed-line telephony, mobile telephony, data transfer, and subscription television report quarterly with monthly breakdowns. Bandwidth information is reported annually.

For all services, general information on employment, investments, and other data is reported semi-annually.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

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2   A digital platform that integrates a web application and a business intelligence solution. SITEL is comprised of two interfaces; the first is for SUTEL employees, while the second is for a duly authorized person or persons, approved by each telecommunication service operator and/or provider, whereby the user can enter the information required to compile and construct the indicators in downloadable templates.

telecommunication service operators and providers. The workshop was hosted on a virtual platform in 2024. 81 representatives of telecom service operators and providers where in attendance, representing 49 different operators with active commercial offerings. The virtual format allowed for interactive presentations and surveys, which were well received by participants.

TABLE 2. SUPERINTENDENCY OF TELECOMMUNICATIONS: Number of attendees who participated in the "Telecommunication Indicators Workshop", broken down by company, dated February 22nd, 2024

No.	Operator / Provider	Quantity	No.	Operator / Provider	Quantity
1	1. OPERATOR AND PROVIDER IN THE PROCESS OF OBTAINING A LICENSE	1	17	COOPERATIVA DE ELECTRIFICACIÓN RURAL DE GUANACASTE R.L. (COOPEGUANACASTE)	1
2	2. OPERATOR AND PROVIDER IN THE PROCESS OF OBTAINING A LICENSE	1	18	COOPERATIVA DE ELECTRIFICACIÓN RURAL LOS SANTOS R.L (COOPESANTOS)	1
3	ANTARES WIFI S.A.	1	19	CRVOICECLOUD VOIP LTDA	2
4	BLANCA IRIS MORA VILLALOBOS	1	20	DATHAN NETWORKS SRL	1
5	BLUE SAT SERVICIOS ADMINISTRADOS DE TELECOMUNICACIONES S.A.	3	21	DOMUSNET S.R.L.	1
6	BT GLOBAL COSTA RICA SRL	1	22	EMPRESA DE SERVICIOS PÚBLICOS DE HEREDIA	1
7	CABLE CARIBE S.A.	1	23	FIBRAENCASA, S.A.	1
8	CALL MY WAY NY S.A.	1	24	GAUSS INGENIERÍA RAC S.A.	1
9	CENTRAL DE SERVICIOS PC S.A.	1	25	GOLD DATA COSTA RICA SOCIEDAD ANÓNIMA	1
10	CINEMA TURRIALBA S.A.	1	26	INSTITUTO COSTARRICENSE DE ELECTRICIDAD	8
11	CIRION TECHNOLOGIES COSTA RICA S.R.L.	2	27	INTERPHONE S.A.	2
12	CLARO CR TELECOMUNICACIONES, S.A.	2	28	JUNTA ADMINISTRATIVA DEL SERVICIO ELÉCTRICO MUNICIPAL DE CARTAGO (JASEC)	5
13	COLUMBUS NETWORKS DE COSTA RICA SRL	1	29	LIBERTY TELECOMUNICACIONES DE COSTA RICA LY SOCIEDAD ANÓNIMA	1
14	COMUNICACIONES METROPOLITANAS METROCOM S.A. (METROCOM)	1	30	LOQUITECK SOCIEDAD DE RESPONSABILIDAD LIMITADA	1
15	COMUNICACIONES TELEFÓNICAS TICOLINEA S.A.	1	31	MILLICOM CABLE COSTA RICA S.A.	3
16	CONSORCIO NACIONAL DE EMPRESAS DE ELECTRIFICACIÓN DE COSTA RICA R.L. (CONELECTRICA)	1	32	MULTISETEC S.R.L.	1
			33	MUNDOREDES S Y H COSTA RICA SRL	3

No.	Operator / Provider	Quantity
34	NAVINTEL S. R. L.	1
35	NETCO	1
36	NEUTRONA NETWORKS COSTA RICA SRL	1
37	P.L.S.I. FIBERNET S.A.	1
38	R & H INTERNATIONAL TELECOM SERVICES S.A.	1
39	RADIOGRÁFICA COSTARRICENSE S.A.	2
40	RED Y COMUNICACIONES REYCOM DEL SUR, S.A.	1
41	REDES INTEGRADAS CORPORATIVAS S.R.L. (REICO)	5

No.	Operator / Provider	Quantity
42	SOLBATEC SOLUCIONES TECNOLÓGICAS	1
43	SOLUCIONES BALTU TECNOLOGÍA S.A.	1
44	TELECABLE, S.A.	1
45	TILANET SOCIEDAD DE RESPONSABILIDAD LIMITADA	1
46	TRANSDATELECOM S.A.	3
47	UFINET COSTA RICA S.A.	1
48	WIRELESS COMMUNICATIONS K.V.F.	1
49	WIRNET EMPRESA DE TELECOMUNICACIONES SOCIEDAD ANÓNIMA	1

Source: SUTEL, General Directorate of Markets. Annual Workshop on the Telecommunication Sector's Market Indicators Costa Rica. 2024.

Review and analysis of information

Once the information is received via SITEL, it is then reviewed and analyzed by a team led by a group of professionals with the General Directorate of Markets (DGS as per its acronym in Spanish). The actions taken as a result of this general verification process include: (i) determining the information's consistency over time; and (ii) preparing the final report. In the event of non-compliance, clarifications and/or corrections may be requested.

Regarding the different services, any inconsistencies are immediately reported to the operator, first by e-mail, then by telephone and –finally– by delivery of a formal notice by the General Directorate of Markets. In the event that an operator requests a modification of the historical data, said operator is made aware that such a request must be brought to the attention of SUTEL's board of directors, and must be filed together with a formal justification.
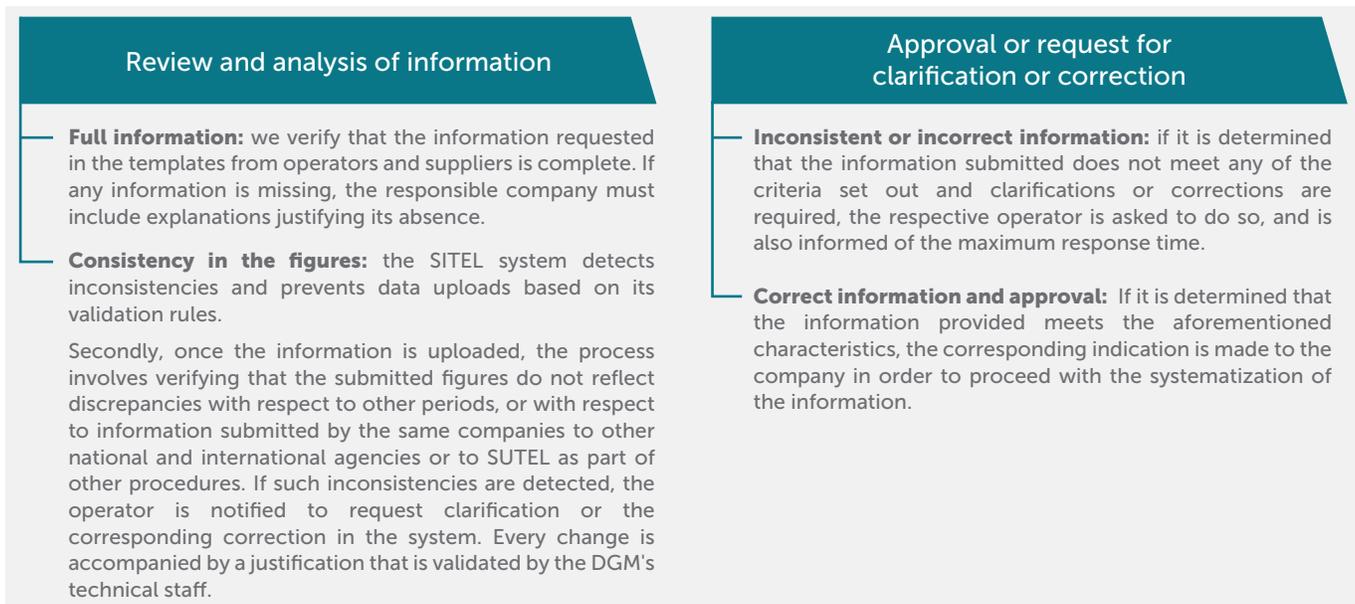
It is important to note that SUTEL ensures compliance with Law No. 9694, National Statistical System, which stipulates the obligation to provide information for statistical purposes. Specifically, Article 19 states that "The information provided or supplied within the framework of the PEN (National Statistics Program) shall always be timely and accurate, under penalty of the sanctions established in this Law."

It is further worth noting that, since SITEL was implemented in 2020 for the purpose of reporting and uploading information, the review process was further improved as the new system supports the setting of intrinsic validation rules that limit telecom service operators and providers from entering any information that is not consistent with the historically reported data. For example, these rules prevent users from entering information measured in a unit different than previously reported (thousands or millions of colones, Kbps or MB), among other restrictions.

As part of this phase, the analyst conducting the review must make sure to include information from the operators with the largest market share in order to guarantee that the statistical results are indeed representative of the sector.

FIGURE 4. Review and analysis process of the information required to construct the Telecommunication Sector's indicators

Review and analysis of information	Approval or request for clarification or correction
Full information: we verify that the information requested in the templates from operators and suppliers is complete. If any information is missing, the responsible company must include explanations justifying its absence.	**Inconsistent or incorrect information:** if it is determined that the information submitted does not meet any of the criteria set out and clarifications or corrections are required, the respective operator is asked to do so, and is also informed of the maximum response time.
Consistency in the figures: the SITEL system detects inconsistencies and prevents data uploads based on its validation rules.	**Correct information and approval:** If it is determined that the information provided meets the aforementioned characteristics, the corresponding indication is made to the company in order to proceed with the systematization of the information.
Secondly, once the information is uploaded, the process involves verifying that the submitted figures do not reflect discrepancies with respect to other periods, or with respect to information submitted by the same companies to other national and international agencies or to SUTEL as part of other procedures. If such inconsistencies are detected, the operator is notified to request clarification or the corresponding correction in the system. Every change is accompanied by a justification that is validated by the DGM's technical staff.	

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

It is worth noting that, in addition to the review process, a number of meetings have been held during the year with different operators to clarify any concerns relating to the indicators in the data collection templates, and to share any observations that the Superintendency may have regarding the data provided.
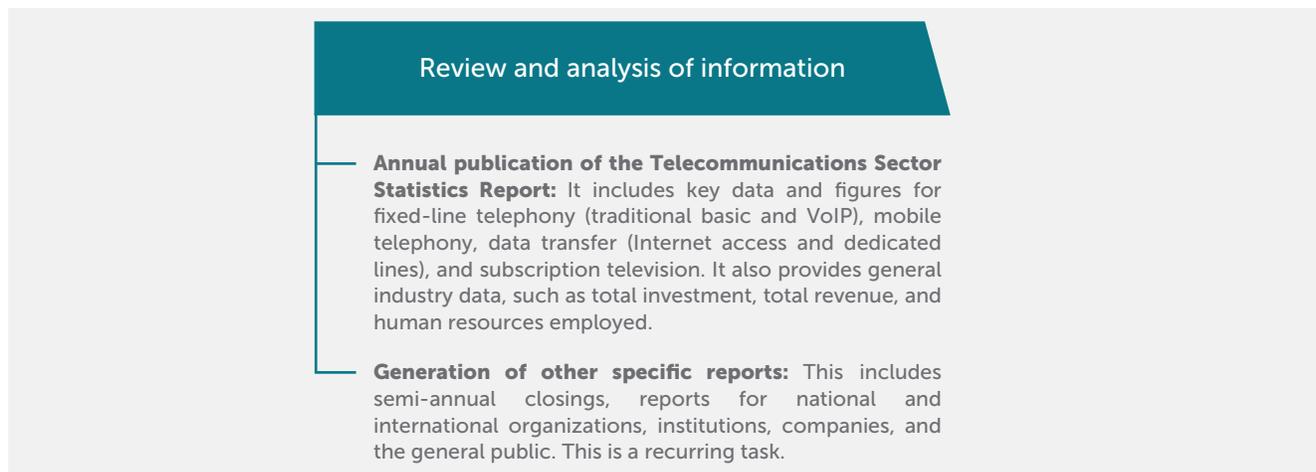
Calculation of results

This process is part of the Preparation of Indicators and Reports phase and uses the information provided by the network operators and telecom service providers, in addition to any other information obtained from national and international secondary sources (such as INEC, the ITU, the World Economic Forum, etc.). A half-yearly report is prepared and published on SUTEL's official website alongside this annual report. The following reports were prepared in compliance with commitments to international organizations:

- *OECD-BB-Portal-June2023_Preview*, March 6th, 2024

- *Bianual_ITU World Telecom_CT Regulatory Survey*, March 26th, 2024

- *ITU World Telecommunication/ICT Indicators Short questionnaire*, April 23rd, 2024

- *ICT PRICE BASKET*, May 23rd, 2024

- *OECD-BB-Portal-Dec2023_Preview*, July 19th, 2024

- *ITU Survey on Tariff Policies*, September 16th, 2024

- *ITU World Telecomunication/ICT Indicators Long Questionnaire*, December 9th, 2024

FIGURE 5. Result calculation process and measurement of Telecommunication Sector's indicators

Review and analysis of information

— **Annual publication of the Telecommunications Sector Statistics Report:** It includes key data and figures for fixed-line telephony (traditional basic and VoIP), mobile telephony, data transfer (Internet access and dedicated lines), and subscription television. It also provides general industry data, such as total investment, total revenue, and human resources employed.

— **Generation of other specific reports:** This includes semi-annual closings, reports for national and international organizations, institutions, companies, and the general public. This is a recurring task.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

The information compiled in this report includes yearly and quarterly figures that allow for a detailed study of services in terms of revenue, data traffic and number of subscriptions. Moreover, in order to analyze the 2020-2024 period, geometric growth rates were calculated to analyze the indicators' year-over-year growth. It should be noted that the geometric growth model assumes a constant percentage growth over time, unlike the simple model, in which the rate of change increases by the same amount per unit of time measured.

In other words, the basic model operates on the assumption that the variable of analysis grows by the same amount (quantity) per unit of time measured, while the geometric rate model assumes that the percentage of growth remains constant, and not the amount (quantity), per unit of time measured. As such, this model can be used for especially long periods. It should, consequently, be understood that whenever reference is made to the average annual growth rate, this means the geometric growth rate.

Summary of market behavior indicators included in this report

The definitions for each of the market's key performance indicators are listed below for the benefit of the reader. They are consistent with the definitions used by the International Telecommunication Union (ITU).

TABLE 3. Fixed telephony service indicators, 2024

Indicator	Definition
Total active telephone landlines	Total number of active landlines that have been duly assigned to a customer, provided that said customer's service is not under definitive suspension (articles 12 and 34 of the Regulation on the Telecommunications Service End User Protection Regime (RPUF as per its acronym in Spanish)) and has registered at least one billable event during the last monthly billing cycle, or who has entered into a service agreement in full force and effect with the operator.
Active VoIP subscriptions/plans	Number of active landline subscriptions using Voice over Internet Protocol (VoIP). Should only include the total number of VoIP subscriptions that have generated inbound or outbound traffic during the last three months. Does not include: VoIP software applications (e.g.: Skype VoIP between two computers, or between a computer and a mobile device)
ISDN BRI and ISDN PRI service subscriptions	Total number of Integrated Services Digital Network (ISDN) subscriptions, which include: basic rate interface (BRI) services and primary rate interface (PRI) services.
Plain old telephone service (POTS) traffic	Network traffic from calls made through analog and/or digital telephone landlines.
Total VoIP traffic	Network traffic from calls made through Voice over Internet Protocol (VoIP) telephony service.
Inbound international telephone traffic	Total inbound traffic from an international network (off-net) to a national network (on-net).
Outbound international telephone traffic	Total outbound traffic from a national network (on-net) to an international network (off-net).
Total revenue from plain old telephone service (POTS) traffic (retail)	Refers to the revenue obtained from basic rate subscription plans + surplus + other line items associated with the provision of fixed telephony services. *
Total VoIP revenue (retail)	This indicator refers to the revenue obtained from basic rate subscription plans + surplus + other line items associated with the provision of VoIP services. *
Number of active fixed telephone subscriptions under individual plan or package deal categories	Fixed telephone subscriptions sold on an individual basis (not packaged with other services) and fixed telephone subscriptions sold alongside other telecommunication services as package deals.

Note: *The total gross revenue earned from the sale of telecommunication services by a provider offering services within the country; it does not include: taxes, devaluations, rebates, bonuses, discounts, canceled sales, and financial expenses, among others.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 4. Data transfer service indicators, 2024

Indicator	Definition
Active fixed Internet subscriptions (wired)	The sum total of active fixed Internet subscriptions using a wired connection (cable modem, xDSL, Fiber-to-the-Home (FTTH), Fiber-to-the-Building (FTTB), and other fixed wired technologies).
Active fixed Internet subscriptions (wireless)	The sum total of active fixed Internet subscriptions using a wireless connection (satellite, fixed WiMAX, and other fixed wireless technologies).
Active mobile Internet subscriptions	The sum total of active mobile Internet subscriptions (prepaid and postpaid cellular data plans, Data Card, mobile WiMAX, and other mobile technologies).

Indicator	Definition
Active dial-up Internet subscriptions	Number of active dial-up Internet subscriptions. This service connects to the Internet via a modem and fixed telephone line; it requires that the modem dial a phone number when Internet access is needed.
Dedicated line subscriptions (leased links)	Number of private dedicated line subscriptions. A dedicated line connects two locations for private voice and/or data telecommunication service. These lines do not use a special cable, and instead use a reserved circuit between two points. Businesses typically rent these types of lines to connect branch offices as they guarantee the necessary bandwidth for network traffic.
Internet traffic	Refers to the amount of data that is transmitted and downloaded (in gigabytes) by all users with access to the Internet service.
Total revenue from dedicated lines	The sum total of the revenue obtained from the provision of dedicated lines.
Maximum available download speed	The maximum Internet speed available for downloading data when given access to an Internet service.
Minimum available download speed	The minimum Internet speed available for downloading data when given access to an Internet service.
Total revenue from fixed (wired) Internet service	The sum total of the revenue obtained from the provision of fixed (wired) Internet service. *
Total revenue from fixed (wireless) Internet service	The sum total of the revenue obtained from the provision of fixed (wireless) Internet service. *
Total revenue from mobile Internet service	The sum total of the revenue obtained from the provision of mobile Internet service. *
Number of active fixed Internet subscriptions under individual plan or package deal categories	Fixed Internet subscriptions sold on an individual basis (not packaged with other services) and fixed Internet subscriptions sold alongside other telecommunication services as package deals.

Note: *The total gross revenue earned from the sale of telecommunication services by a provider offering services within the country; it does not include: taxes, devaluations, rebates, bonuses, discounts, canceled sales, and financial expenses, among others.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 5. Mobile telephony service indicators, 2024

Indicator	Definition
Active postpaid mobile telephone subscriptions	Total number of postpaid mobile telephone subscriptions that pay a monthly subscription fee and register at least one billable event during the last monthly billing cycle, and whose service is not under definitive suspension in accordance with articles 12 and 34 of the RPUF.
Active prepaid mobile telephone subscriptions	Total number of prepaid mobile telephone subscriptions that register in their available service balance at least one billable event during the ninety calendar days prior to the last billing cycle, and that are part of the prepaid platform.
Total capacity of installed mobile lines	The maximum number of mobile lines that can be connected. This includes previously connected mobile lines and other mobile lines available for ulterior connections, which also include any mobile lines used for the technical operation of the telephone exchange (test numbers).

Indicator	Definition
Mobile traffic (voice calls, SMS and MMS)	The total traffic of the mobile telephone service.
Mobile network to proprietary fixed-line network traffic	Traffic from a proprietary mobile network (on-net) to a proprietary fixed-line telephone network (fixed-line network of the same operator).
On-net mobile traffic	Traffic from one mobile network to the same mobile network (on-net traffic).
Mobile network to other mobile network traffic	Traffic from a proprietary mobile network (on-net) to another mobile network (mobile network of another operator).
Other mobile network to proprietary mobile network traffic	Traffic from the fixed-line network of another operator (off-net) to a proprietary mobile network (on-net).
Proprietary fixed-line network to proprietary mobile network traffic	Traffic from a proprietary fixed-line telephone network to a proprietary mobile network (on-net).
Mobile network to other fixed-line network traffic	Traffic from a proprietary mobile network (on-net) to another fixed-line network (off-net).
Other fixed-line network to proprietary mobile network traffic	Traffic from the fixed-line network of another operator (off-net) to a proprietary mobile network (on-net).
Mobile network to international network traffic	Traffic from a proprietary mobile network (on-net) to an international network (off-net).
International network to proprietary mobile network traffic	Traffic from an international network (off-net) to a proprietary mobile network (on-net).
Mobile transit traffic	Traffic from off-net networks (other fixed-line, mobile and long-distance international networks) to other off-net networks (other fixed-line, mobile and long-distance international networks) that travels through a proprietary mobile network (on-net).
Total mobile voice traffic by telephone plan	The sum total of the mobile voice traffic broken down by telephone plan (prepaid or postpaid). To calculate this indicator, one must add the outbound on-net traffic and off-net traffic; that is to say:
Total mobile voice traffic	Total on-net mobile voice traffic + Total off-net mobile voice traffic (outbound mobile voice traffic from a proprietary mobile network to other mobile networks, to a proprietary fixed-line network, to other fixed-line networks, and to international networks).
Postpaid on-net SMS traffic	SMS traffic between postpaid subscribers within the same mobile network.
Prepaid on-net SMS traffic	SMS traffic between prepaid subscribers within the same mobile network.
Postpaid off-net SMS traffic	Inbound and outbound SMS traffic sent and received by postpaid mobile telephone subscribers.
Prepaid off-net SMS traffic	Inbound and outbound SMS traffic sent and received by prepaid mobile telephone subscribers.
Domestic postpaid or prepaid SMS traffic	SMS traffic within a country sent from mobile devices under a postpaid or prepaid plan.
International postpaid or prepaid SMS traffic	International SMS traffic sent from mobile devices under a postpaid or prepaid plan.
Postpaid on-net MMS traffic	MMS traffic between postpaid subscribers within the same mobile network.

Indicator	Definition
Prepaid on-net MMS traffic	MMS traffic between prepaid subscribers within the same mobile network.
Postpaid off-net MMS traffic	Inbound and outbound SMS traffic sent and received by postpaid mobile telephone subscribers.
Prepaid off-net MMS traffic	Inbound and outbound MMS traffic sent and received by prepaid mobile telephone subscribers; does not include on-net MMS traffic.
Domestic postpaid or prepaid MMS traffic	MMS traffic within a country sent from mobile devices under a postpaid or prepaid plan.
International postpaid or prepaid MMS traffic	International MMS traffic sent from mobile devices under a postpaid or prepaid plan.
Outbound roaming telephone traffic	Total minutes of telecommunication traffic made by own customers in a local network roaming on foreign networks abroad; i.e.: when outside of the local network's service area (outbound roaming).
Inbound roaming telephone traffic	Total minutes of telecommunication traffic made by own customers in a local network roaming on foreign networks abroad; i.e.: when outside of the local network's service area (outbound roaming).
Outbound international SMS and MMS roaming traffic	Traffic generated by own mobile subscribers by sending SMS and MMS messages when outside of the local network's service area.
Inbound international SMS and MMS roaming traffic	Traffic generated by own mobile subscribers by receiving SMS and MMS messages when outside of the local network's service area (inbound roaming).
Inbound roaming data traffic (TB)	Data traffic sent (in TB) by own subscribers when accessing the Internet outside of the local network's service area (inbound roaming).
Outbound roaming data traffic (TB)	Data traffic received (in TB) by own subscribers when accessing the Internet outside of the local network's service area (outbound roaming).
Average price	The average price of a voice call from a mobile device (prepaid or postpaid).
Average price of a 1-minute mobile telephone local call (peak, on-net) to a cellular network	The price per minute of a peak rate local call made from a mobile telephone. This indicator is calculated by dividing the revenue from on-peak rate mobile calls made on-net (prepaid or postpaid) by the number of minutes (traffic) used by all mobile subscribers. Includes tax.
Average price of a 1-minute mobile telephone local call (off-peak, on-net) to a cellular network	The price per minute of an off-peak rate local call made from a mobile telephone with a prepaid or postpaid plan to a mobile telephone subscriber of the same network. This indicator is calculated by dividing the revenue from off-peak rate mobile calls made off-net by prepaid subscribers by the number of minutes (traffic) used by prepaid mobile subscribers. Includes tax.

Indicator	Definition
Average price of a 1-minute mobile telephone local call (off-peak, off-net) to a cellular network	The price per minute of an off-peak rate local call made from a mobile telephone with a prepaid or postpaid plan to a mobile telephone subscriber of another competing network. This indicator is calculated by dividing the revenue from off-peak rate mobile calls made off-net by prepaid subscribers by the number of minutes (traffic) used by prepaid mobile subscribers. Includes tax.
Average price of a 1-minute mobile telephone local call (peak, to fixed) to a fixed telephone network	The price per minute of a peak rate local call made from a mobile telephone with a prepaid or postpaid plan to a fixed telephone subscriber. This indicator is calculated by dividing the revenue from on-peak rate mobile calls made by prepaid subscribers to fixed networks by the number of minutes (traffic) used by prepaid mobile subscribers. Includes tax.
Average price of a 1-minute mobile telephone local call (off-peak, to fixed) to a fixed telephone network	The price per minute of an off-peak rate local call made from a mobile telephone with a prepaid or postpaid plan to a fixed telephone subscriber. This indicator is calculated by dividing the revenue from off-peak rate mobile calls made by prepaid subscribers to fixed networks by the number of minutes (traffic) used by prepaid mobile subscribers. Includes tax.
Average price of a 1-minute mobile telephone local call (peak, off-net) to a cellular network	The price per minute of a peak rate local call made from a mobile telephone with a prepaid or postpaid plan to a mobile telephone subscriber of another competing network. This indicator is calculated by dividing the revenue from on-peak rate mobile calls made by prepaid subscribers off-net by the number of minutes (traffic) used by prepaid mobile subscribers. Includes tax.
Average price of a 1-minute mobile telephone local call (weekend/evening, on-net) to a cellular network	The price per minute of a weekend/evening rate call made from a mobile telephone with a prepaid or postpaid plan to a mobile telephone subscriber of the same network. Must include tax. Otherwise, the applicable tax rate must be stated in a note. This indicator is calculated by dividing the revenue from weekend/evening rate mobile calls made by prepaid subscribers on-net by the number of minutes (traffic). Includes tax.
Average price of a 1-minute mobile telephone local call (weekend/evening, off-net) to a cellular network	The price per minute of a weekend/evening rate call made from a mobile telephone with a prepaid or postpaid plan to a mobile telephone subscriber of another competing network. This indicator is calculated by dividing the revenue from weekend/evening rate mobile calls made by prepaid subscribers off-net by the number of minutes (traffic). Includes tax.
Average price of a 1-minute mobile telephone local call (weekend/evening, to fixed) to a fixed telephone network	The price per minute of a weekend/evening rate call made from a mobile telephone with a prepaid or postpaid plan to a fixed telephone subscriber. This indicator is calculated by dividing the revenue from weekend/evening rate mobile calls made by prepaid subscribers to fixed networks by the number of minutes (traffic). Includes tax.
Average price of SMS (on-net) for prepaid and postpaid mobile telephone subscribers.	The price of sending a Short Message Service (SMS) message from a mobile telephone with a prepaid or postpaid plan to a mobile telephone subscriber of the same network. This indicator is calculated by dividing the revenue from SMS messages by the number of SMS messages sent on-net. Includes tax.
Average price of SMS (off-net) for prepaid and postpaid mobile telephone subscribers	The price of sending a Short Message Service (SMS) message from a mobile telephone with a prepaid or postpaid plan to a mobile telephone subscriber of the same network. This indicator is calculated by dividing the revenue from SMS messages by the number of SMS messages sent off-net. Includes tax.

Indicator	Definition
Revenue from prepaid or postpaid mobile telephony services	Revenue obtained from prepaid or postpaid mobile telephony services. This indicator is calculated by adding the revenue from monthly subscriptions, the revenue from overage fees charged for extra minutes, and the revenue from other fees charged for the provision of mobile telephony services that do not stem from monthly subscriptions or overage fees, as is the case of fines for suspension and reconnection of service.*
Revenue from prepaid or postpaid mobile voice traffic (on-net)	Revenue obtained from mobile voice traffic originating from a company's own mobile network (on-net) that is then redirected to a mobile telephone subscriber of the same network (on-net).*
Revenue from outbound prepaid or postpaid mobile voice traffic	Revenue obtained from mobile voice traffic originating from a company's own mobile network (on-net) that is then redirected to an off-net telephone subscriber (i.e.: to the company's own fixed network, to other fixed networks, to other mobile networks, or to other international networks).*
Revenue from monthly subscriptions or prepaid/postpaid minimum rate plans	Revenue obtained from the collection of recurring fees charged to mobile telephone subscribers for the provision of prepaid or postpaid telephone services.*
Revenue from overage fees charged to prepaid or postpaid mobile telephone subscribers	Revenue obtained from overage fees charged for extra minutes exceeding the limit of prepaid or postpaid minimum rate plans. Includes local and international call minutes that exceed the limit of the plan.*
Revenue from inbound prepaid or postpaid mobile voice traffic	Revenue obtained from mobile voice traffic originating off-net (i.e.: from a company's own mobile network, from other fixed networks, from other mobile networks, or from other international networks) that is then redirected to an on-net telephone subscriber (company's own fixed network).*
Revenue from international outbound prepaid or postpaid mobile voice traffic	Revenue obtained from mobile voice traffic originating from a company's own mobile network (on-net) that is then redirected to other off-net international networks.*
Revenue from international inbound prepaid or postpaid mobile voice traffic	Revenue obtained from traffic originating from an off-net international network that is then redirected to an on-net network (own mobile network).*
Revenue from SMS on-net messages sent by prepaid or postpaid mobile telephone subscribers	Revenue obtained from Short Message Service (SMS) messages sent by prepaid or postpaid mobile telephone subscribers in the same network.*
Revenue from SMS off-net messages sent by prepaid or postpaid mobile telephone subscribers	Revenue obtained from Short Message Service (SMS) messages sent by prepaid or postpaid mobile telephone subscribers to other off-net subscribers in domestic and international networks.*
Revenue from MMS on-net messages sent by prepaid or postpaid mobile telephone subscribers	Revenue obtained from Multimedia Message Service (MMS) messages sent by prepaid or postpaid mobile telephone subscribers in the same network. *
Revenue from MMS off-net messages sent by prepaid or postpaid mobile telephone subscribers	Revenue obtained from Multimedia Message Service (MMS) messages sent by prepaid or postpaid mobile telephone subscribers to other off-net subscribers in domestic and international networks.*
Revenue from MMS messages sent by prepaid or postpaid mobile telephone subscribers to domestic networks	Revenue obtained from Multimedia Message Service (MMS) messages sent to mobile telephone subscribers in domestic networks. Does not include messages sent via a computer to other mobile devices.*

Indicator	Definition
Revenue from MMS messages sent by prepaid or postpaid mobile telephone subscribers to international networks	Revenue obtained from Multimedia Message Service (MMS) messages sent to mobile telephone subscribers in international networks. Does not include messages sent via a computer to other mobile devices. *
Revenue from SMS messages sent by prepaid or postpaid mobile telephone subscribers to domestic networks	Revenue obtained from Short Message Service (SMS) messages sent by mobile telephone subscribers to other subscribers in domestic networks.*
Revenue from SMS messages sent by prepaid or postpaid mobile telephone subscribers to international networks	Revenue obtained from Short Message Service (SMS) messages sent by mobile telephone subscribers to other subscribers in international networks.*
Total revenue from MMS messages	Revenue obtained from Multimedia Message Service (MMS) messages sent to domestic and international networks. Does not include messages sent via a computer to other mobile devices.*
Revenue from outbound roaming telephone traffic (minutes)	Revenue obtained from a company's own mobile subscribers that make and receive calls when outside the country (outside home network), e.g.: when traveling abroad.*
Revenue from inbound roaming telephone traffic (minutes)	Revenue obtained from visiting (foreign) subscribers that make and receive calls within the country. This includes the revenue from visiting (foreign) subscribers earned by the network operators within the country.*
Revenue from outbound SMS & MMS roaming traffic	Revenue obtained from a company's own mobile subscribers that send SMS and MMS messages when outside the country (outside home network).*
Revenue from inbound SMS & MMS roaming traffic	Revenue obtained from visiting (foreign) subscribers that receive SMS and MMS messages within the country. This includes the revenue from visiting (foreign) subscribers earned by the network operators within the country.*
Inbound roaming data traffic (TB)	Revenue obtained from visiting (foreign) subscribers that access the Internet within the country. This includes the revenue from visiting (foreign) subscribers earned by the network operators within the country.*
Outbound roaming data traffic (TB)	Revenue obtained from a company's own mobile subscribers that access the Internet when outside the country (outside home network).*
Wholesale revenue from mobile telephony services	Wholesale revenue obtained from the provision of fixed telephony services. This specifically refers to the revenue from call termination charges within a company's own mobile network. This indicator is calculated by adding the revenue from inbound traffic on a company's own mobile network.*
Number of active mobile telephone subscriptions under individual plan or package deal categories	Mobile telephone subscriptions sold on an individual basis (not packaged with other services) and mobile telephone subscriptions sold alongside other telecommunication services as package deals.

Note: *The total gross revenue earned from the sale of telecommunication services by a provider offering services within the country; it does not include: taxes, devaluations, rebates, bonuses, discounts, canceled sales, and financial expenses, among others.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 6. Pay television service indicators, 2024

Indicator	Definition
Total number of multi-channel TV subscriptions	The number of multi-channel TV subscriptions that are terrestrially transmitted over a Hybrid Fiber-Coaxial (HFC) network. These networks support the provision of other telecommunication services.
Total number of multi-channel Direct to Home (DTH) satellite antenna TV subscriptions	The number of multi-channel TV subscriptions that are transmitted to a home satellite antenna that can receive television broadcasting directly from an operator's communications satellite.
Total number of multi-channel IPTV subscriptions	The number of multi-channel TV subscriptions that are transmitted via broadband connections using the IP protocol.
Total number of multi-channel TV subscriptions using the Multichannel Multipoint Distribution Service (MMDS)	The number of multi-channel TV subscriptions that are transmitted via the Multipoint Microwave Distribution Service (MMDS), whereby signals are wirelessly transmitted to the end user. This service supports the provision of other telecommunication services.
Revenue from TV subscription services (includes revenue from subscriptions, installations, basic plans and added value)	The total revenue earned from the provision of TV subscription services before any deductions (including taxes, returns, rebates, bonuses, discounts, and canceled sales, among others) by a provider offering services within the country.*
Number of active TV subscriptions under individual plan or package deal categories	TV subscriptions sold on an individual basis (not packaged with other services) and TV subscriptions sold alongside other telecommunication services as package deals.

Note: *The total gross revenue earned from the sale of telecommunication services by a provider offering services within the country; it does not include: taxes, devaluations, rebates, bonuses, discounts, canceled sales, and financial expenses, among others.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 7. General service indicators, 2024

Indicator	Definition
Total telecommunication staff	Total number of (full-time and outsourced*) staff employed by telecommunications network operators and service providers in the country for the provision of telecommunication services. Does not include personnel employed in national broadcasting networks, if said networks only provide traditional broadcasting services. *Includes outsourced personnel if and only if they are trained as specialists in the provision of telecommunication services (ITU).

Indicator	Definition
Total outsourced telecommunication staff	Total number of outsourced staff employed by telecommunications network operators and service providers in the country for the purpose of providing telecommunication services. It is worth noting that outsourced personnel must be trained as specialists to apply, otherwise the data will not form part of the indicator (i.e.: cleaning staff, marketing, security, etc.). Does not include personnel employed in national broadcasting networks, if said networks only provide traditional broadcasting services. In the event that the number of outsourced employees is unknown, please provide an approximate number of outsourced personnel per activity.
Female telecommunication staff	The number of (full-time and outsourced*) telecommunication staff that are female. *Includes outsourced personnel if and only if they are trained as specialists in the provision of telecommunication services.
Total semiannual investment in telecommunication services	This is the gross capital expenditure incurred over the last 6 months in connection with tangible and intangible assets, by a company that provides telecommunication services in the country, in the interest of acquiring and/or improving properties, factories and networks. **INCLUDES**: *The acquisition of non-tangible assets, such as: intellectual property, software, licenses and patents (see ID G8). *Expenses related to the acquisition of facilities, or from the expansion of preexisting facilities, that are expected to be used for long periods of time. **DOES NOT INCLUDE:** *Operating expenses from day-to-day activities. *Research and Development (R&D) expenses. *Radio frequency spectrum license fees (see ID G8). *Expenses from software and telecom equipment intended for internal use (ITU). **NOTE:** In the event of amounts expressed in a currency other than colones, the amount shall be converted to colones using the exchange rate of the Central Bank of Costa Rica as reported at the close of each month during the fiscal year. In the event that the expense is shared in the provision of a service other than a telecommunication service, the corresponding share of expense shall be estimated. In the event that the expense is recorded as credit, the real value of the purchase shall be recorded.
Kilometers of optical fiber	The number of kilometers of fiber optic cables installed to date. **NOTE:** Does not include infrastructure intended for own use.
Number of active subscriptions sold under different models (individual plans and double, triple and quadruple packages)	The number of telecommunication service subscriptions sold on an individual basis (not packaged with other services) and subscriptions sold alongside other telecommunication services as package deals.

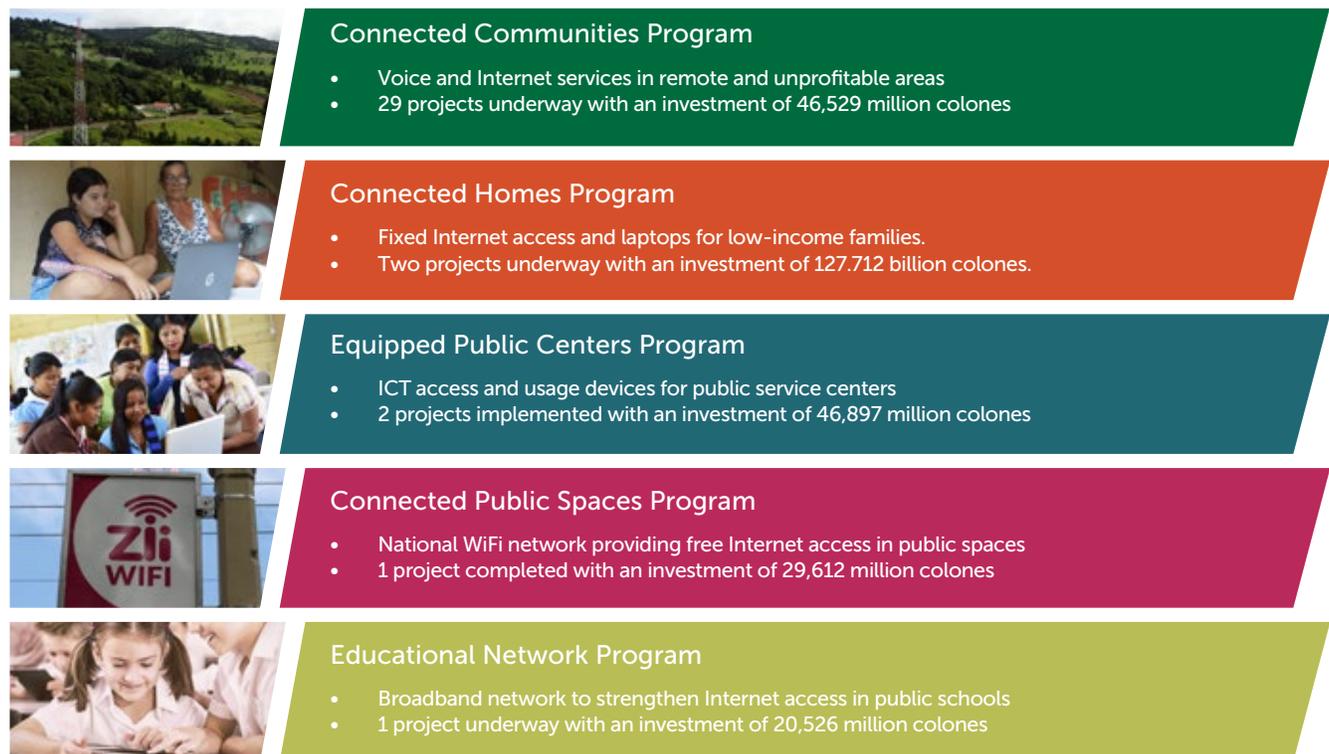Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

Methodology applied to the monitoring and evaluation system of FONATEL programs and projects

The General Telecommunications Act (Act No. 8642; articles 31 to 40, and Transitory Provision VI) authorizes SUTEL to develop projects that guarantee the access to, and the use of, telecommunication services by vulnerable populations, or by populations that reside in low economic areas. This is achieved through the use of resources from the National Telecommunications Fund (FONATEL), in pursuance with the objectives established in the aforementioned Act, and in accordance with the goals and priorities defined in the National Telecommunications Development Plan (PNDT).

In order to determine the scope of the programs and projects, which are being developed with FONATEL resources, regarding universal access, universal service, and solidarity, SUTEL created, on the basis of the goals established in the PNDT, the Annual Project and Program Plan (PAPyP as per its acronym in Spanish) to plan, organize, monitor and evaluate these programs and projects.

The portfolio of programs financed with FONATEL resources closed 2024 with five programs covering 46 projects in different phases of their life cycle[3]. These five programs are collectively associated with nine goals of the 2022-2027 National Telecommunications Development Plan (PNDT). Figure No. 6 lists all the programs under development with FONATEL resources.

FIGURE 6. COSTA RICA: Portfolio of programs in development[4] with FONATEL resources in 2024

Connected Communities Program
- Voice and Internet services in remote and unprofitable areas
- 29 projects underway with an investment of 46,529 million colones

Connected Homes Program
- Fixed Internet access and laptops for low-income families.
- Two projects underway with an investment of 127.712 billion colones.

Equipped Public Centers Program
- ICT access and usage devices for public service centers
- 2 projects implemented with an investment of 46,897 million colones

Connected Public Spaces Program
- National WiFi network providing free Internet access in public spaces
- 1 project completed with an investment of 29,612 million colones

Educational Network Program
- Broadband network to strengthen Internet access in public schools
- 1 project underway with an investment of 20,526 million colones

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

3   At the end of 2024, the Connected Communities Program has 39 projects in the four phases of the life cycle, namely: in-initiation, in-planning, in-progress, and completed; the Provisioned Public Centers Program also has projects in the planning, execution, and closure phases (one in each phase). The programs that only have projects in execution (active) are: Connected Households (two projects), Connected Public Spaces, and Education Network, with one project each.

4   Includes all programs with projects, under development with FONATEL resources, in any phase of the development life cycle; namely: the "in-initiation", "in-planning", "in-progress", and "completed" phases.

It is worth mentioning that the development life cycle of a project in a FONATEL program consists of four phases, as detailed below:

a) **In-initiation:** the process of defining a new project, whereby its value and feasibility are measured. This involves the reception and evaluation of proposed initiatives, the prefeasibility study, the development of a pre-project outline, and the issuance of a development order (ODS as per its acronym in Spanish) or the filing of articles of incorporation for the implementation of the new project.

b) **In-planning:** the process of determining the scope of the project and defining the course of action required to achieve the proposed objectives. This involves the preparation of the forms required for the adjudication process, whereby the provider that will be responsible for the execution of the project is selected, the socioeconomic study, the development of the financial scheme, the development of the Project and Program plans, and the adjudication to the operator or service provider who wins the bid. This phase consists of the preparation of forms and the bidding/ adjudication process.

  • Preparation of forms: this only includes projects in the "in-planning" phase; it involves everything from the preparation of the development order (ODS) to the preparation of the request for proposal (RFP) document.

  • Bidding / adjudication: this only includes projects in the "in-planning" phase; it involves everything from the initiation of the bidding process to the conclusion of the adjudication process, whereby the winning bidder is selected.

c) **In-progress:** the process of executing or developing a project in accordance to the scope of work defined in the program and project plans (in-initiation phase), and the process of controlling and monitoring a project's progress and general performance (including payment management, quality control, risk and change management, and

monitoring of product delivery). This phase starts once the project has been awarded to a network operator or service provider and ends once the project is successfully completed. This phase consists of the following two processes: execution/ reception and production.

  • Execution / Reception: this only includes projects in the "in-progress" phase; it involves everything from the initial development of the project, including the adjudication to the winning bidder, to the reception of the final product. Includes the reception and approval of infrastructure and equipment.

  • Production: this only includes projects in the "in-progress" phase; specifically, projects in operation (provision of services). It involves everything from the first operation of the infrastructure to the completion of the contract.

d) **Completed**: the process of completing and delivering a project. This involves the finalization and completion of contracts, and the preparation of the project closing documentation.

In the framework of the phases defined above, and as part of the control, monitoring and evaluation processes of the programs under development with FONATEL resources, two types of indicators are defined, developed, compiled and analyzed; namely: (i) operational indicators (which measure a project's progress), and (ii) assessment indicators (which estimate the effect a project will have on the target population, in addition to the perception that a beneficiary of the program may have). This report only covers the operational indicators of the programs with projects in the "In-progress" phase.

It should be noted that the general results pertaining to the Telecommunication Sector that are reported and analyzed in the sections corresponding to each type of service covered in this report include, implicitly, all the data for programs and projects financed with FONATEL resources up to the cut-off-date and, therefore, this data does not need to be included in order to have a complete view of the sector.

Operational indicators of FONATEL programs

Operational indicators measure the progress of goals set forth in the PNDT of each program, and the overall progress of each project. In other words, they provide information regarding the performance of the services provided, the development of infrastructure, and the provision of support devices and products[5], on the basis of each initiative and program developed with the National Telecommunications Fund (FONATEL) managed by SUTEL. The compilation and analysis of these indicators is carried out on a monthly basis via reports made by the trustee of the trust and the management units[6] of the pertinent programs and projects, in accordance with clause 14, section d.4, of the trust agreement.

Operational indicators are subdivided into four categories (see Figure no. 7), namely: (i) "achievement of goals" to monitor the progress of goals set forth in the existing PNDT; (ii) "administrative" to monitor the operational progress of the project; (iii) "beneficiaries" to quantify the populations that have benefited from the projects and programs; and (iv) "financial" to measure how well the Fund's resources were executed in the development of project and programs aimed at reducing the digital divide.

FIGURE NO. 7. Result calculation process and measurement of Telecommunication Sector's indicators

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

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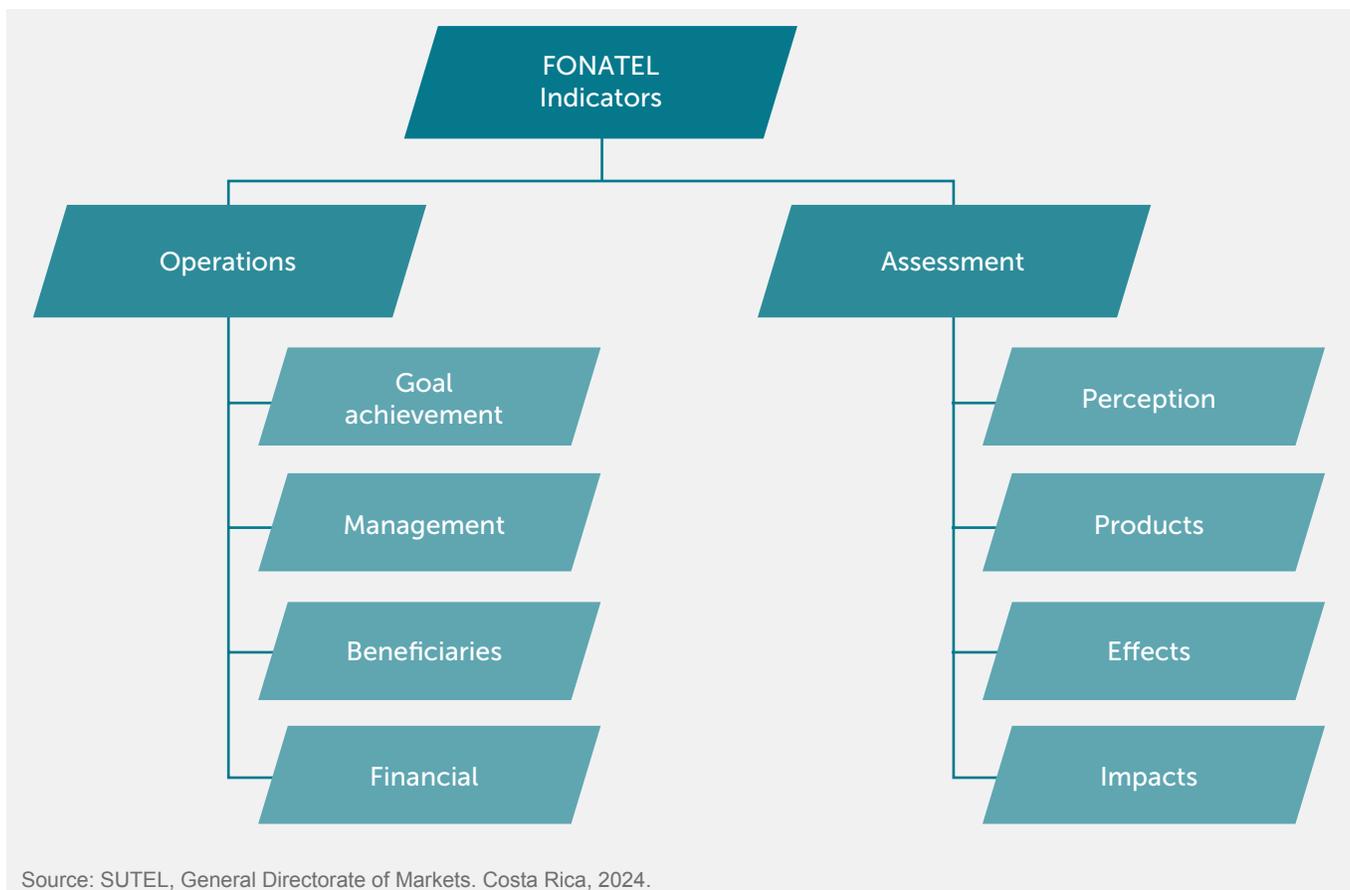
5   Support products are devices, equipment, and instruments that enable access to and use of ICTs, as well as products designed to promote the autonomy of persons with disabilities.
6   Management Unit: an auxiliary body of the trust, comprised by a team of professionals or specialists engaged by the trustee to provide support in the technical areas required for the projects and programs to be carried out using the trust's resources. With respect to the programs in the "In-progress" phase, the management units are in charge of the following firms: Ernst & Young, Price Waterhouse Coopers, and the SPC-NAE consortium.

The Logical Framework Approach[7] and the Results Chain[8] methods were used in the compilation of the operational indicators to ensure that programs, projects, and their associated actions are well aligned with the objectives and goals of public policy, as established in the existing PNDT.

This methodology involves templates for recording information and a catalog of indicators developed in conjunction with the respective management units. The indicators' templates are completed by the management units and are sent on a monthly basis to the General Directorate of FONATEL by the trustee of the trust. The Directorate's technical team reviews the historic data, taking into account the specific details provided by the trustee in the monthly management reports of the programs and projects approved by SUTEL's board of directors, and in the monthly follow-up meetings with the trustee and the management units. Additional controls are then implemented, based on the visits made to sites that are covered and the information requests made by the institutions involved in the execution of the project.

In addition, the General Directorate of Markets verified the indicators in accordance with the provisions assigned by SUTEL's board of directors in pursuance with agreement 0-12-054-2021 (07336-SUTEL-SCS-2021), dated August 9th, 2021.

For the purposes of presentation and comprehension, the results of FONATEL indicators are analyzed in the two following groups:

- **Aggregate results:** results based on indicators that measure, in a general and aggregated manner, the joint execution of programs and projects financed and developed within the framework of FONATEL.

- **Results per program:** the performance results of each of the programs and projects financed with FONATEL; these results measure the status and progress of each of the projects under development.

The following is an excerpt from FONATEL's catalog of operational indicators.[9]

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7   The Logical Framework Matrix is a four-row by four-column instrument that summarizes the most important aspects of a project. Columns: summary of objective and activities, indicators (specific results to be achieved), means of verification, and assumptions (external factors involving risk). Rows: components of the Analytical Project Structure: objective, purpose, components/results and the activities required to produce Components/Results.
8   The *results chain* provides a clear and logical definition of how the sequence of inputs, activities, and outputs directly related to the intervention interact and enable the achievement of results, effects, and impacts.
9   The catalog of operational indicators, and their subdivisions, was validated in a joint process between the General Directorate of FONATEL and the General Directorate of Markets in order to guarantee the consistency of the definitions and the validity of the comparisons. These indicators were approved by SUTEL's board of directors by way of agreements No. 002-031-2020 and No. 003-031-2020 (notified by means of official letters No. 03396-Sutel-SCS-2020 and No. 03397-Sutel-SCS-2020 on April 20th, 2020), and by way of agreements No. 011-057-2020 and No. 013-057-2020 (notified by means of official letters No. 07324-Sutel-SCS-2020 and No. 07326-Sutel-SCS-2020 on August 18th, 2020).

TABLE 8. COSTA RICA: Catalog of indicators for monitoring and evaluating FONATEL programs and projects in the "In-progress" phase, 2023

Group	Type of Indicator	Name of Indicator	Description of Indicator
Aggregate	Administrative	Total number projects developed with FONATEL	Total number of projects developed with FONATEL resources per status and phase of development life cycle.
Aggregate	Administrative	Number of districts with at least one program in development with FONATEL resources	Total number of districts with at least one project under development due to a program funded by FONATEL with (total or partial) connectivity to voice and data services, or with at least one household who has benefited from an Internet service subsidy and a device with which to use this service, or with a CPSP that has devices for accessing and using ICTs, or with a free Internet access zone.
Aggregate	Administrative	Number of devices granted through programs developed with FONATEL resources to provide access to ICTs	Total number of devices distributed to Centers for the Provision of Public Services (CPSP), through FONATEL's Programs, to provide access to, and make use of, Information and Communications Technologies.
Aggregate	Administrative	Number of Centers for the Provision of Public Services that have received benefits through FONATEL programs	Total number of Centers for the Provision of Public Services (CPSP) that have received benefits (fixed voice and data services and/or devices for accessing and using ICTs) through programs under development with FONATEL resources.
Aggregate	Administrative	Number of households with access to voice and data services in districts where FONATEL programs are being developed	Total estimated number of households, in districts where FONATEL programs are being developed, with access to voice and data services.
Aggregate	Administrative	Number of dwellings with access to voice and data services in districts where FONATEL programs are being developed	Total estimated number of dwellings, in districts where FONATEL programs are being developed, with access to voice and data services.
Aggregate	Beneficiary	Number of inhabitants with access to voice and data services in districts where FONATEL programs are being developed	Total estimated number of inhabitants, in districts where FONATEL programs are being developed, with access to voice and data services.
Aggregate	Beneficiary	Fixed Internet subscriptions provided through FONATEL programs	Total number of residential fixed Internet subscriptions provided through FONATEL programs.
Aggregate	Financial	Equity of FONATEL	Total FONATEL resources received from the different sources of financing established in article 38 of the General Telecommunications Act. The sum of the Fund's assets and liabilities.

Group	Type of Indicator	Name of Indicator	Description of Indicator
Aggregate	Financial	Collected special parafiscal contributions	Total amount contributed to the Fund by the telecommunication service operators and providers; it represents 1.5 % of the gross income directly obtained from the operation of networks and the provision of telecommunication services.
Aggregate	Financial	Investment made by FONATEL	The sum total of the amounts executed by the Fund in the development of each of the programs and projects financed with FONATEL.
Program 1	Achievement of goal	Districts with (total or partial) connectivity to voice and data services as a result of the Connected Communities Program	Total number of districts with (total or partial) connectivity to voice and data services as a result of FONATEL's Connected Communities Program.
Program 1	Achievement of goal	Achievement of the goal established in the PNDT regarding districts with connectivity under the Connected Communities Program	Percentage of completion of the goal established in the National Telecommunications Development Plan (PNDT), within the framework of the Connected Communities Program, regarding the total number of districts with (total or partial) connectivity to voice and data services.
Program 1	Achievement of goal	Indigenous territories with (total or partial) connectivity to voice and data services as a result of the Connected Communities Program	Total number of indigenous territories with (total or partial) connectivity to voice and data services as a result of FONATEL's Connected Communities Program.
Program 1	Achievement of goal	Achievement of the goal established in the PNDT regarding indigenous territories with connectivity under the Connected Communities Program	Percentage of completion of the goal established in the National Telecommunications Development Plan (PNDT), within the framework of the Connected Communities Program, regarding the total number of indigenous territories with (total or partial) connectivity to voice and data services.
Program 1	Administrative	Total projects under the Connected Communities Program per project status	Total number of projects under FONATEL's Connected Communities Program per status and phase of development life cycle.
Program 1	Administrative	Total number of towers equipped with telecommunication infrastructure through the Connected Communities Program per construction-operation status	Total number of towers equipped with telecommunication infrastructure, through FONATEL's Connected Communities Program, per construction status.
Program 1	Administrative	Centers for the Provision of Public Services that have been given Internet access through the Connected Communities Program per service status	Total number of Centers for the Provision of Public Services (CPSP) that have been given Internet access through FONATEL's Connected Communities Program per service status.

Group	Type of Indicator	Name of Indicator	Description of Indicator
Program 1	Beneficiary	Number of inhabitants and households in districts with (total or partial) connectivity that were provided potential access to voice and data services through the Connected Communities Program	Total number of inhabitants, in districts with (total or partial) connectivity, with potential access to voice and data services as a result of the projects in the "In-progress" phase of FONATEL's Connected Communities Program.
Program 1	Beneficiary	Active fixed Internet subscriptions provided through the Connected Communities Program	Total number of active residential fixed Internet subscriptions provided through FONATEL's Connected Communities Program.
Program 1	Beneficiary	Active fixed telephony subscriptions provided through the Connected Communities Program	Total number of active residential fixed telephony subscriptions (with at least one billable event during the last month of service, or with an ongoing service agreement with the operator) provided through FONATEL's Connected Communities Program.
Program 1	Beneficiary	Active mobile telephony subscriptions provided through the infrastructure made available by the Connected Communities Program	Total number of active mobile telephony subscriptions provided through the infrastructure made available by FONATEL's Connected Communities Program.
Program 1	Beneficiary	Amount of the population that has benefited from the Connected Communities Program	Total number of inhabitants in districts or indigenous territories with (total or partial) connectivity to voice and data services as a result of FONATEL's Connected Communities Program that have at least one active fixed and/or mobile telephony subscription.
Program 1	Financial	Investments made through the Connected Communities Program	The sum total of the amounts executed by the Fund in the financing and development of each of the projects under the Connected Communities Program.
Program 2	Administrative	Number of households that were contacted through the Connected Households Program per detail status	Total number of households, registered in the Beneficiary Management System of FONATEL's Connected Households Program, that have been contacted by a telecommunication service provider, per detail status.
Program 2	Achievement of goal	Number of households that have benefited from the Connected Households Program per status	Total number of households that have benefited from an Internet service subsidy and a device with which to use this service (including active and inactive devices), provided through FONATEL's Connected Households Program, per status of activity.
Program 2	Achievement of goal	Achievement of the goal established in the PNDT regarding households benefiting under the Connected Communities Program	Percentage of completion of the goal established in the National Telecommunications Development Plan (PNDT), within the framework of the Connected Households Program, regarding the total number of households benefiting from an Internet service subsidy and a device with which to use this service.
Program 2	Administrative	Districts with coverage under the Connected Households Program	Total number of districts under FONATEL's Connected Households Program with at least one household benefiting from an Internet service subsidy and a device with which to use this service.

Group	Type of Indicator	Name of Indicator	Description of Indicator
Program 2	Administrative	Total projects under the Connected Households Program per project status	Total number of projects under FONATEL's Connected Households Program per status and phase of development life cycle.
Program 2	Beneficiary	Active Internet subscriptions subsidized through the Connected Households Program	Total number of Internet subscriptions (with active service) subsidized through FONATEL's Connected Households Program.
Program 2	Administrative	Market penetration of residential fixed Internet services provided through the Connected Households Program	Percentage of total households in the country that have subscribed to the residential fixed Internet access service provided through FONATEL's Connected Households Program and maintain an active subscription[10].
Program 2	Administrative	Percentage of total households that have benefited from the Connected Households Program	The percentage of total households in the country that have benefited from FONATEL's Connected Households Program.
Program 2	Beneficiary	Amount of the population that has benefited from the Connected Communities Program	The percentage of the country's total population that has benefited from FONATEL's Connected Households Program (i.e.: from an Internet service subsidy and a device with which to use this service).
Program 2	Administrative	Amount of women-headed households that have benefited from the Connected Households Program	Total number of women-headed households that have benefited from an Internet service subsidy and a device with which to use this service (including active and inactive devices) provided through FONATEL's Connected Households Program.
Program 2	Administrative	Children that have benefited from the Connected Households Program	Total number of underage children residing in households that have benefited from an Internet service subsidy and a device with which to use this service (including active and inactive devices) provided through FONATEL's Connected Households Program.
Program 2	Financial	Investments made through the Connected Households Program	The sum total of the amounts executed by the Fund in the financing and development of each of the projects under the Connected Households Program.
Program 3	Achievement of goal	Number of devices delivered to CPSPs for accessing ICTs through the Provisioned Public Centers Program	Total number of devices distributed to Centers for the Provision of Public Services (CPSP), through FONATEL's Provisioned Public Centers Program, to provide access to, and make use of, Information and Communications Technologies.

10 To calculate, divide the active subsidized subscriptions by the total number of dwellings in the country as reported in the National Household Survey (ENAHO) published by the National Institute of Statistics and Censuses (INEC). To calculate this indicator, the numerator must be divided by the number of dwellings to be consistent with the market penetration indicator, as defined by the International Telecommunication Union (ITU), which defines penetration as the fraction of the total market in which services have been successfully introduced. In this respect, a dwelling refers to the physical infrastructure in which the installation of services takes place, and which may include one or several households with access to the installed service. In addition, in the surveys conducted by INEC, telecommunication services are measured per dwelling.

Group	Type of Indicator	Name of Indicator	Description of Indicator
Program 3	Achievement of goal	Achievement of the goal established in the PNDT regarding the distribution of devices to CPSPs under the Connected Communities Program	Percentage of completion of the goal established iin the National Telecommunications Development Plan (PNDT), within the framework of the Provisioned Public Centers Program, regarding the total number of devices distributed to Centers for the Provision of Public Services (CPSPs), to provide access to, and make use of, Information and Communications Technologies.
Program 3	Administrative	Achievement of the goal established in the RFP regarding the distribution of devices to CPSPs under the Connected Communities Program, per institution	Percentage of completion of the goal established in the Request For Proposal (RFP) documentation of the Provisioned Public Centers Program, regarding the total number of devices distributed to Centers for the Provision of Public Services (CPSPs), to provide access to, and make use of, Information and Communications Technologies, per institution.
Program 3	Administrative	Total projects under the Provisioned Public Centers Program per project status	Total number of projects under FONATEL's Provisioned Public Centers Program per status and phase of development life cycle.
Program 3	Administrative	CPSPs that have benefited from the Provisioned Public Centers Program	Total number of Centers for the Provision of Public Services (CPSPs) that were provided devices, under FONATEL's Provisioned Public Centers Program, to access and make use of ICTs.
Program 3	Administrative	Districts with coverage under the Provisioned Public Centers Program	Total number of districts with at least one CPSP benefiting from FONATEL's Provisioned Public Centers Program.
Program 3	Financial	Investments made through the Provisioned Public Centers Program	The sum total of the amounts executed by the Fund in the financing and development of each of the projects under the Connected Communities Provisioned Public Centers Program.
Program 4	Achievement of goal	Free Internet access zones made available through the Connected Public Spaces Program per service status	Total number of free Internet access zones made available through FONATEL's Connected Public Spaces Program, per service status.
Program 4	Achievement of goal	Achievement of the goal established in the PNDT regarding free Internet access zones under the Connected Public Spaces Program	Percentage of completion of the goal established in the National Telecommunications Development Plan (PNDT), within the framework of the Connected Public Spaces Program, regarding the total number of free Internet access zones in operation.
Program 4	Administrative	Percentage of progress made regarding free Internet access zones in operation under the Connected Public Spaces Program	Percentage of completion of the goal established in the Request For Proposal (RFP) documentation of FONATEL's Connected Public Spaces Program regarding the total number of free Internet access zones in operation.

Group	Type of Indicator	Name of Indicator	Description of Indicator
Program 4	Administrative	Access points (AP) installed in free Internet access zones made available through the Connected Public Spaces Program, per status	Total number of access points (AP) installed in free Internet access zones made available through FONATEL's Connected Public Spaces Program, per status.
Program 4	Administrative	Total projects under the Connected Public Spaces Program per project status	Total number of projects under FONATEL's Connected Public Spaces Program per status and phase of development life cycle.
Program 4	Administrative	Districts with coverage under the Connected Public Spaces Program	Total number of districts with coverage under FONATEL's Connected Public Spaces Program with at least one free Internet access zone in operation.
Program 4	Administrative	Unique devices that connected to the free wireless Internet network provided through the Connected Public Spaces Program	Total number of devices (with unique MAC addresses) that connected to the free wireless Internet network provided through the Connected Public Spaces Program.
Program 4	Administrative	Total number of sessions initiated by users in free Internet access zones made available through the Connected Public Spaces Program	Total number of sessions initiated by users in free Internet access zones made available through FONATEL's Connected Public Spaces Program.
Program 4	Administrative	Total hours of network usage in free Internet access zones made available through the Connected Public Spaces Program	Total hours of network usage by users in Wifi networks in free Internet access zones made available through FONATEL's Connected Public Spaces Program.
Program 4	Administrative	Total data traffic in free Internet access zones made available through the Connected Public Spaces Program	Total monthly data consumption, in GB, by users in free Internet access zones made available through FONATEL's Connected Public Spaces Program.
Program 4	Financial	Investments made through the Connected Public Spaces Program	The sum total of the amounts executed by the Fund in the financing and development of each of the projects under the Connected Public Spaces Program.
Program 5	Achievement of goal	Achievement of the goal established in the PNDT regarding progress under the Bicentennial Education Network Program	Percentage of completion of the goal established in the National Telecommunications Development Plan (PNDT), as per the latest goal management update, within the framework of the Bicentennial Education Network Program, regarding the progress of FONATEL's area of focus.
Program 5	Achievement of goal	Progress of FONATEL's area of focus under the Bicentennial Education Network Program	Percentage of completion of FONATEL's area of focus under the Bicentennial Education Network Program.

Group	Type of Indicator	Name of Indicator	Description of Indicator
Program 5	Administrative	Education Centers scheduled for service	Total number of education centers, assigned to FONATEL's area of focus, that have been scheduled for service under the Bicentennial Education Network Program.
Program 5	Administrative	Education Centers visited by a contractor	Total number of education centers, assigned to FONATEL's area of focus, visited by the contractor responsible for surveying the technical requirements (diagnosis) necessary for the installation of networks and equipment.
Program 5	Administrative	Education Centers with completed technical requirement assessments for installation	Total number of education centers, assigned to FONATEL's area of focus, with a completed technical requirement assessment for the installation of the networks and equipment.
Program 5	Administrative	Education Centers with a proposed solution under review by the Management Unit	Total number of education centers, assigned to FONATEL's area of focus, wherein the contractor has provided the Management Unit with a design or sketch of the internal network and equipment installation proposal (solution).
Program 5	Administrative	Education Centers with a solution fully approved by the director	Total number of education centers, assigned to FONATEL's area of focus, with a fully approved design or sketch of the internal network and equipment installation proposal (solution).
Program 5	Administrative	Education Centers with connectivity and internal networks	Total number of education centers, assigned to FONATEL's area of focus, wherein the contractor has installed and configured the data links and WAN Internet connectivity (layer 1), the passive and electromechanical infrastructure of the internal LAN network (layer 2), and the active equipment of the internal LAN network (layer 3a).
Program 5	Administrative	Education Centers connected to the Bicentennial Education Network	Total number of education centers, assigned to FONATEL's area of focus, wherein the contractor has completed the project to the satisfaction of the Management Unit and the institution's director, and is therefore considered to be fully connected to the Bicentencial Education Network.
Program 5	Administrative	Districts with coverage under the Bicentennial Education Network Program	Total number of districts with at least one education center benefiting from FONATEL's Bicentennial Education Network Program.
Program 5	Administrative	Students in education centers connected to the Bicentennial Education Network	Total number of students enrolled in education centers, assigned to FONATEL's area of focus, that have been connected to the Bicentennial Education Network to the satisfaction of the Management Unit and the institution's director.
Program 5	Financial	Investment made through the Bicentennial Education Network Program	The sum total of the amounts executed by the Fund in the financing and development of each of the projects under the Bicentennial Education Network Program.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

Methodology for evaluating the quality and performance of networks

Methodology used to evaluate the quality of fixed Internet services

Included providers

The national measurement system of fixed Internet services uses equipment installed nationwide to evaluate the quality of the services provided by the operators with the largest domestic market share, and the highest concentration of users[11]. Above all, the evaluation needs to include information from the four largest fixed Internet service providers, which account for more than 90 % of the total subscriptions; these providers are:

- "Instituto Costarricense de Electricidad", under its commercial brand **Kölbi**.

- "Liberty Telecomunicaciones de Costa Rica Liberty S. A.", under its commercial brand **Liberty**.

- "Claro CR Telecomunicaciones", under its commercial brand **Claro**.

Evaluated services

Internet service providers offer a wide variety of connectivity options; these are predominantly classified by the speed of the service provided.

Evaluation of the fixed Internet service quality indicators is achieved by measuring the most prominent services; in particular, the services with the largest number of active users per provider. In some cases, however, a specific Internet speed may not be available in a particular location. In such cases, the service with the closest Internet speed and highest number of active users shall be the evaluated service.

The services in this report are, for the most part, of a residential nature, as these are the most predominant nationwide and, therefore, the most representative of Internet services across the country. In addition, in view of the provisions of the RPCS, an evaluation of only residential services sufficiently reflects the quality of the Internet services provided nationwide.

Evaluated services are provided through different types of technologies; namely: i) copper, using ADSL technologies; ii) coaxial, using DOCSIS technologies; and iii) optical fiber, using FTTH or GPON networks. Evaluations are carried out by using ping and http tests to assess the operator's Internet service performance. This makes them largely independent of the type of technology used to provide a service to the end user and, therefore, allows for these services to be evaluated regardless of the technology used for its provision.

The results shown in this report were obtained from quality assessments conducted on a total of 416 active Internet subscriptions across the seven provinces nationwide, which are simultaneously evaluated 24 hours a day, through the *measurement probe system* described in the following section. The number of Internet services used to assess each operator is shown in Table 9.

It should be noted that the number of services used to assess each operator is sufficiently representative as they exceed the minimum number of sites or measurements required in accordance with the methodology approved by SUTEL, via Resolution No. RCS-019-2018, which was published in the official gazette "La Gaceta" No. 42 on February 27th, 2018.

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11   In pursuance of SUTEL's obligation to inspect, assigned in accordance with article 73, paragraph k, of the Public Utilities Regulatory Authority Act (Act No. 7593), the evaluation of the fixed Internet service quality shall focus on operators with nationwide coverage and significant market share, in order for the results to be representative of the quality of the service provided nationwide.

TABLE 9. Number of services evaluated per operator

Operator	San Jose	Alajuela	Cartago	Heredia	Guanacaste	Puntarenas	Limon	Total per operator
Kölbi	19	16	14	10	14	20	11	104
Liberty	22	16	15	13	17	15	6	104
Telecable	31	15	15	17	13	10	3	104
Tigo	27	21	11	16	14	8	7	104
Total per province	**99**	**68**	**55**	**56**	**58**	**53**	**27**	**416**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

Equipment used to conduct the quality evaluations

Each Internet service is evaluated via measurement probes; a specialized device (hardware and software) that is purposefully built for conducting quality evaluations. The measurement probes and the data measurement and processing servers are a part of a coordinated system for conducting quality evaluations nationwide.

The use of measurement probes is recognized by the International Telecommunication Union (ITU) as a potential option for measuring the quality of a service in accordance with ITU-T E.812 Amendment 1 (09/2020) Appendix III[12], and ITU-T E.806 Recommendation (06/2019)[13]. In the matter of using measurement probes, the latest ITU recommendation specifically refers to measurement probes as a means of performing unattended tests, and highlights the following: Unattended tests can provide historical end-to-end quality of service (QoS) results in near real-time, and can be used to collect granular data that can help detect QoS degradations.

Evaluated quality indicators

The three indicators defined in Chapter Seven of the Service Provision and Quality Regulations (RPCS) (published in the Official Gazette "La Gaceta" No. 36 on Friday, February 17th, 2017) require evaluation. These indicators are:

- International/local latency
- Ratio of measured throughput to provisioned throughput

Each of these indicators are described below.

International/local latency

The latency indicator is evaluated by conducting ping tests, whereby the time it takes to send 100 ICMP Echo Request packets, and receive 100 ICMP Echo Reply packets, is measured. The result of the ping test is the average value of the response time of 100 different responses.

The international latency indicator is evaluated by conducting ping tests against a dedicated server in Florida, USA, in the NAP of the Americas IXP and Data Center.

Each measurement probe performs at least one ping measurement every 20 minutes, and keeps taking measurements 24x7.

Ratio of measured throughput to provisioned throughput

The ratio of data throughput to provisioned throughput is determined by transferring files via HTTP protocol during a period of at least 10 seconds. A separate measurement is taken for data download (*HTTP Download*) and data upload (*HTTP Upload*).

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12   Document available in: https://www.itu.int/rec/T-REC-E.812/es
13   Document available in: https://www.itu.int/rec/T-REC-E.806/es

The data throughput results are compared against the provisioned throughput for each Internet service to determine the ratio of measured throughput to provisioned throughput.

Each measurement probe performs at least one HTTP measurement every 20 minutes and keeps taking measurements 24x7.

Methodology used to evaluate the quality of mobile voice and data services

Included providers

The quality of the mobile voice and data services is determined via field measurements of the country's three mobile network operators. These operators are:

- "Instituto Costarricense de Electricidad", under its commercial brand **Kölbi**.

- "Liberty Telecomunicaciones de Costa Rica Liberty S. A.", under its commercial brand **Liberty**.

- "Claro CR Telecomunicaciones", under its commercial brand **Claro**.

Measurement system

The measurement system used by SUTEL in 2023 consisted of a total of 72 measurement probes fitted into vehicles that travel across the country over the course of the year. Said measurement system additionally consists of robust control and measurement servers that serve as a counterpart to the remote equipment; enabling SUTEL to collect, record and process large amounts of data.

The use of measurement probes is recognized by the International Telecommunication Union (ITU) as a potential option for measuring the quality of a service in accordance with Recommendation No. ITU-T E.806 (06/2019), which is titled "Measurement campaigns, follow-up systems and sampling methodologies for monitoring the quality of service in mobile networks."

The measurement probes that evaluate the quality of the mobile services are fitted into vehicles that travel across the country, thereby acting as a type of drive test, in sets of three, one per operator, to guarantee that the measurements are taken simultaneously and, therefore, can serve as a fair basis of comparison for the three operators under evaluation.

Evaluated quality indicators

In regard to data-based services across mobile networks, the same exact indicators used to evaluate the quality of fixed services are measured for comparison, which were described above.

In regard to voice-based services across mobile networks, however, the indicators described in Chapter Five and Six of the **Service Provision and Quality Regulations**, titled "Voice Service Indicators" and "Mobile Service Indicators" according to the current service provision and quality regulations respectively, are measured for comparison. These indicators are:

- Mobile service coverage

- Percentage of unsuccessful calls

- Percentage of dropped calls

- Call set-up time

- Voice call quality of telephone services

In regard to data-based services across mobile networks, the three indicators described in Chapter Seven, titled "Internet Service Indicators according to the current service provision and quality regulations," are measured for comparison; namely: local latency, international latency, and data throughput. These indicators, and how they are measured, were described above.

The mobile service coverage indicator, and the other voice service performance indicators, are described below.

Mobile service coverage

The mobile service coverage indicator is evaluated by comparing the signal strength levels measured

in the field against the signal strength levels of the mobile services reported by the operators. This comparison is made to determine what percentage of the measurements made in the field are actually consistent with coverage measurements reported by the operator.

To evaluate this indicator, signal strength data is collected from 2G networks (Received Signal Strength, abbreviated as RxLev Full), 3G networks (Received Signal Code Power, abbreviated as RSCP), and 4G networks (Reference Signal Received Power, abbreviated as RSRP). The subsequent results are then compared against the coverage measurements reported by the operators to SUTEL.

Percentage of unsuccessful calls

The percentage of unsuccessful calls indicator is the ratio of the total number of unsuccessful calls to the total number of valid call attempts during a given period.

To evaluate this indicator, test calls are made to auto-answer numbers and the network's call set-up time is recorded. If the call is entirely unsuccessful, or if the call set-up time exceeds 10 seconds, the call attempt is considered unsuccessful.

Percentage of dropped calls

The percentage of dropped calls indicator is the ratio of the total number of successful calls that have been assigned a communication channel that are then dropped or interrupted before proper termination by the user, to the total number of successful calls; in these cases, the cause of the early termination is the operator's network.

To evaluate this indicator, test calls are made to auto-answer numbers and, once the call is successful, held for a period of 90 seconds. If the call is interrupted by the operator's network before the 90 seconds have elapsed the call is considered dropped.

Call set-up time

The call set-up time indicator is the time it takes a network, from the moment the information required to set-up the call is received (i.e.: when the initiation of the call signal is received by the user's network), to the moment until the caller receives a busy tone, dial tone, or answer signal.

To evaluate this indicator, test calls are made to auto-answer numbers and the network's call set-up time, in seconds, is recorded.

Voice call quality of telephone services

The voice call quality of telephone services indicator is a percentage that compares the characteristics of an emitted signal (sound and voice) to the characteristics of the signal received in a telephone communication.

To evaluate this indicator, calls are made from a measurement probe to a dedicated voice server specifically set up for this purpose. This evaluation is conducted via test calls and the POLQA algorithm (Recommendation No. ITU-T P.863), which uses a high quality standard voice file that meets the specifications established by the ITU. The voice call quality is scored on a MOS scale with a range of 1-5, where 1 is the lowest possible quality and 5 is the highest possible quality.

Methodology used to evaluate the quality of the experience perceived by mobile Internet subscribers

Included providers

The three mobile service providers authorized to operate in the country are included. These providers are:

- "Instituto Costarricense de Electricidad", under its commercial brand **Kölbi**.

- "Liberty Telecomunicaciones de Costa Rica Liberty S. A.", under its commercial brand **Liberty**.

- "Claro CR Telecomunicaciones", under its commercial brand **Claro**.

Methodology for evaluating the quality of the experience perceived by users

The experience perceived by mobile telephone users is evaluated through the use of the Opensignal application, which users have the option to voluntarily install and use to determine the status or quality of a mobile service at any given time.

The Opensignal application is available, free of charge, for download on the Google Play and Apple Store storefronts; thereby enabling Opensignal to conduct user experience quality studies in accordance with their agreement with SUTEL.

The application captures data on the quality of service provided outdoors and indoors, exactly as experienced by users, under a wide variety of situations. The data obtained reflects the level of service directly experienced by a given user on his or her smartphone device.

This data is recorded from measurements directly carried out by users, and from measurements that are automatically carried out by the application. Most of the data is obtained from automated measurements that are performed at random intervals to capture the user's experience at specific moments in time.

This approach on measuring the user's experience does not require a dedicated test server. It instead measures the end-to-end experience from the terminal device to a content delivery network (CDN), such as Google, Akamai and Amazon.

Given that this application is voluntarily installed by users, the number of smartphones that use this app may vary over time, as it wholly depends on users installing the application on their mobile devices over an extended period of time.

Methodology for evaluating the commercial offers of telecommunication services

Considering that consumer preferences are constantly evolving over time, a qualitative analysis was carried out on the changes exhibited in terms of composition and characteristics of the commercial offers provided, for mobile and fixed telecommunication services, in 2023 and 2024. The ultimate goal is to understand and record the user demand, and the industry's response to such demand, based on sector's offerings.

In regard to mobile telecommunication services (voice calls, SMS and mobile data), an analysis was carried out with respect to all postpaid plans and prepaid bundles provided by authorized network operators from December 2023 to December 2024. This information was recorded via the "Mi Comparador" web tool.

In regard to fixed telecommunication services (fixed Internet, fixed telephony and pay TV), a comparison is made with respect to the bundle packages offered by the leading network operators from December 2023 to December 2024, specially given that these operators account for 90 % of the total subscriptions in 2024.

The qualitative analysis involves identifying the differences in offerings in terms of the bundling of services, amount of data available, channels, speeds, free applications, and applications with unlimited data, among others. This analysis reflects the changes in consumer trends nationwide, and the way in which commercial offers have adapted to meet consumer expectations over time.

This analysis reflects the changes in consumer trends nationwide, and the way in which commercial offers have adapted to meet consumer expectations over time.

Methodology for calculating the Mobile Telecommunications Price Index

The index is used to monitor the pricing trends of services purchased by mobile telecommunication subscribers.

Monitoring is based on a series of technical criteria, of a statistical and economic nature, established during the development of a general or national index, or on a series of sub-indexes per payment plan.

It should be noted that to calculate the index, and the different degrees of openness, no adjustments are made in terms of mobile data quality. Moreover, it should also be noted that voice and SMS services are considered homogeneous services, as the different operators show a similar level of performance and quality among them due to the similarities in the telecommunication infrastructure used for the provision of services. Other observations of note regarding the calculation of the price index:

- Does not include mobile Internet services provided via a data card.

- Prepaid promotions targeting specific segments are excluded, for example, double top-ups only for numbers ending in 1, to name a few.

- Does not include mobile telecommunication services bundled with other services.

It should also be noted that, given that the telecommunication sector is one of the most dynamic and ever changing industries from a technological and consumer behavior perspective, this methodology must be constantly updated and improved. For this reason, to the extent that changes are introduced, a reasonable effort is made to preserve the comparability of historical data, together with the appropriate caveats and limitations.

The methodology is described below:

Methodology for postpaid plans

The following prices are analyzed, per operator *(i)*, on monthly basis:

- $plPT_{i,c,pl,m_1} \rightarrow$ Unit price[14] per component (on-net voice, off-net voice, on-net SMS, off-net SMS, and mobile data) for each of the plans included in the analysis. Each plan that is included **(pl)** must represent at least 80 % of the monthly revenue from postpaid subscriptions per operator. The analysis includes plans that are currently commercially available, and plans that are not be available to new subscribers but maintain active subscriptions.

- $pePT_{i,c,m_1} \rightarrow$ Excess prices per component.

  Per operator *(i)* and month of analysis **(m_1)**, the unit price for each component **(c)** is calculated for every postpaid plan included in the analysis $\rightarrow$ **($plPT_{i,c,pl,m_1}$)**. The resulting calculations are then averaged to determine the average unit price per component in accordance with the information provided by the operator for each plan $\rightarrow$ **($PMedplPT_{i,c,m_1}$)**.

  Consequently, to calculate the individual price per component for each operator in **m_1** that is subject to an overage price **(pePT)**, a weighted average must first be calculated that includes: (a) the average unit price of each component **($PMedplPT_{i,c,m_1}$)** weighted by the relative weight of the revenue generated from subscriptions versus the total revenue[15] earned by each operator **(α_{i,m_1})**, and (b) the overage price of each component **($pePT_{i,c,m_1}$)** weighted by the relative weight of the revenue generated by overage fees versus the total revenue from

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14 Unit Price: to calculate the unit price, the value of each plan is weighted per service (i.e.: on-net and off-net voice, on-net and off-net data, and on-net and off-net SMS), in accordance with the weight reported for each service component by the operator with regard to the revenue from postpaid subscriptions as of July 2017 (reference month). The resulting calculations are then divided by the number of minutes, messages, and maximum available speed for each plan (in GB), to obtain the price of each service component per unit of measure.

15 Total revenue from postpaid subscriptions= Minimum revenue (monthly revenue from package costs) + Revenue from overage fees

postpaid subscriptions (β_{i,m_1}). Then, with the resulting calculations above, it is possible to calculate, per operator in m_1, the individual price per component (PPT_{i,c,m_1}).

Once the above is obtained, it is possible to calculate in m_1 the relative change in the individual price per component by operator with respect to July 2017 $(\Delta PPT_{i,c,m_1})$. These results, in turn, are weighted by the monthly share that each component represents in relation to the operator's revenue from postpaid subscriptions $(\text{℧}PT_{i,c,m_1})$[16], thereby obtaining a price index for postpaid plans for each service provider in the market $(\mu PT_{i,m_1})$.

Finally, once the price index per operator $(\mu PT_{i,m_1})$ is weighted by the monthly share that each operator represents in relation to the total revenue from postpaid subscriptions $(\text{þ}PT_{i,m_1})$[17], then it is possible to calculate the monthly price index for postpaid plans nationwide $(\tilde{I}PT_{m_1})$.

Formulas for calculating the postpaid plans' price index

$$(1)\ PMedplPT_{i,c,m_1} = \frac{\sum_{npl=1}^{npl} plPT_{i,c,pl,m_1}}{npl_{i,c,m_1}}$$

$$(2)\ PPT_{i,c,m_1} = \propto_{i,m_1} * PMedplPT_{i,c,m_1} + \beta_{i,m_1} * pePT_{i,c,m_1}$$

$$(3)\ \Delta PPT_{i,c,m_1} = \frac{PPT_{i,c,m_1}}{PPT_{i,c,m_0}}$$

$$(4)\ \mu PT_{i,m_1} = \sum_{c=1}^{5} \Delta PPT_{i,c,m_1} * \text{℧}PT_{i,c,m_1}$$

$$(5)\ \tilde{I}PT_{m_1} = \sum_{i=1}^{3} \mu PT_{i,m_1} * \text{þ}PT_{i,m_1}$$

$$(6)\ \tilde{I}PT_{c,m_1} = \Delta PPT_{i,c,m_1} * \text{þ}PT_{i,m_1}$$

Nomenclature

i= Service providers, where 1= Kölbi, 2 = Movistar and 3= Claro

m_0= Reference month, July 2017

m_1 = Month of analysis

c = Components, 1= on-net voice, 2= off-net voice, 3= on-net SMS, 4= off-net SMS, and 5 = mobile data.

PT= Postpaid

pl = The plan(s) included in the analysis for each operator; starting with 1 and ending with z

z = The total number of plans included in the analysis for each operator in m_1

npl_{i,c,m_1}= The number of plans per operator **i** that were included and consist of a component under analysis in m_1

Methodology for prepaid plans:

Prepaid users face three types of prices for each component: package prices $(paqPR_{i,c,paq,m_1})$, promotional prices $(prPR_{i,c,pr,m_1})$, and recharge prices $(recPR_{i,c,m_1})$.

The methodology for calculating the aforementioned prices is presented below:

1. To calculate the average monthly unit price per package by operator $(paqPR_{i,c,paq,m_1})$, sthe same exact methodology for calculating the unit price of postpaid plans is used, the only exception being that all the prepaid packages offered in m_1 are included, thereby obtaining $(PMedprPR_{i,c,m_1})$.

2. The market price of each component per operator in m_1 $(recPR_{i,c,m_1})$; these prices are predetermined by the operators.

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16 For each **i** in m_1, it is satisfied that $\sum_{c=1}^{5} \text{℧}PT_c = 1$
17 For each **i** in m_1, it is satisfied that $\sum_{i=1}^{3} \text{þ}PT_i = 1$

3. In regard to promotions offered by operator in m_1 $(prPR_{i,c,pr,m_1})$, the specific details of each commercial offer are analyzed to estimate the price per component for every promotion, in addition to any international reference information available, such as the data consumption of mobile applications (Facebook, WhatsApp, Waze and Youtube, among others), and any information requested of the operators, such as the average consumption of minutes, data and unlimited messages per user. Once the price per component in each promotion for every operator has been obtained, these results are then averaged to determine the average individual promotional price per component and operator $(PMedprPR_{i,c,m_1})$.

Once the above is obtained, the results of the three previous prices in m_1 are weighted by the share that each revenue source represents in relation to the operator's revenue from prepaid subscriptions during the reference month[18], $wrec_i$ (weight of the revenue from recharge plan pricing per operator i), $wpaq_i$ (weight of the revenue from package pricing per operator i) and wpr_i (weight of the revenue from promotional pricing per operator i), thereby calculating for every operator the individual price per component (PPR_{i,c,m_1}).

Based on this information, the relative percentage change in single prices per component at the operator level is calculated for the month under review with respect to July 2017 $(\Delta PPR_{i,c,m_1})$. These results, in turn, are weighted by the monthly share that each component represents in relation to the operator's revenue from prepaid subscriptions $(ÜPR_{i,c,m_1})$[19], thereby obtaining a price index for prepaid plans for each service provider in the market in a given month $(\mu PR_{i,m_1})$.

Finally, once the price index per operator $(\mu PR_{i,m_1})$ is weighted by the monthly share that each operator represents in relation to the total revenue from pepaid subscriptions in the month of analysis $(þPR_{i,m_1})$[20],

then it is possible to calculate the monthly price index for prepaid plans nationwide $(ĨPR_{m_1})$.

Formulas for calculating the prepaid plans' price index

$$(7)\ PMedprPR_{i,c,m_1} = \frac{\sum_{npr=1}^{npr} prPR_{i,c,pr,m_1}}{npr_{i,c,m_1}}$$

$$(8)\ PPR_{i,c,m_1} = wrec_i * recPR_{i,c,m_1} + wpaq_i * PMedpaqPR_{i,c,m_1 i,c,m_1} + wpr_i * PMedprPR_{i,c,m_1 i,c,m_1}$$

$$(9)\ \Delta PPR_{i,c,m_1} = \frac{PPR_{i,c,m_1}}{PPR_{i,c,m_0}}$$

$$(10)\ \mu PR_{i,m_1} = \sum_{c=1}^{5} \Delta PPR_{i,c,m_1} * ÜPR_{i,c,m_1}$$

$$(11)\ ĨPR_{m_1} = \sum_{i=1}^{5} \mu PR_{i,m_1} * þPR_{i,m_1}$$

$$(12)\ ĨPR_{c,m_1} = \Delta PPR_{i,c,m_1} * þPR_{i,m_1}$$

Nomenclature

i = Service providers: 1= Kölbi, 2= Movistar, 3= Claro, 4= Tuyomóvil, and 5= Fullmóvil

m_0= Reference month, July 2017

m_1 = Month of analysis

c = Components, 1= on-net voice, 2= off-net voice, 3= on-net SMS, 4= off-net SMS, and 5 = mobile data.

PR= Prepaid

npr_{i,c,m_1}= The number of plans per operator i that were included and consist of a component under analysis in m_1

pr = Every prepaid plan promotion offered by operator i in m_1, from 1 to £

£ = Total promotions offered by i in m_1

paq = Every package offered by operator i in m_1 from 1 to η

η = Total packages offered by i in m_1

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18   SUTEL was only able to obtain information regarding this indicator for the reference month.
19   For each i in m_1, it is satisfied that $\sum_{c=1}^{5} ÜPR_c = 1$
20   For each i in m_1, it is satisfied that $\sum_{i=1}^{5} þPR_i = 1$

rec = Price of a recharge per unit of consumption for every component (voice minutes, SMS or GB) offered by the operator **i** in **m**$_1$

National Index ($\tilde{I}NAL_{m_1}$)

For **m**$_1$, the postpaid ($\tilde{I}PT_{m_1}$) and prepaid ($\tilde{I}PR_{m_1}$) indexes are weighted according to the relative weight of each modality within total mobile telecommunications revenues[21] πPT_{m_1} (weight of the postpaid category) and πPR_{m_1} * (weight of the prepaid category)[22].

Formulas for calculating the national price index

$$\tilde{I}NAL_{m_1} = \pi PT_{m1} * \tilde{I}PT_{m_1} + \pi PR_{m1} * \tilde{I}PR_{m_1}$$

Nomenclature

m$_1$ = Month of analysis

Methodology for calculating the FIxed Internet Price Index

Residential Internet in households is increasingly common and has, in many cases, become indispensable for daily life. This is evidenced by the fact that the total number of households with Internet subscriptions rose from 60.2 % in 2015 (source: INEC) to 86.34 % in 2019 (source: INEC). Furthermore, the data presented in this report shows that fixed Internet subscriptions grew by 8.38 % in 2021 in relation to 2020, reaching a total of 1,000,000 subscriptions in 2021.

It should be noted that in December 2017[23], SUTEL declared that this service was being provided under fair competitive conditions and, from then on, the prices were determined by the market's supply and demand.

In view of the above, there is a clear need for a solution that can measure the variation in prices per gigabyte of speed[24], to provide SUTEL with an additional decision-making tool, given that the regulations do not specify a price ceiling, as had been the case from the opening of the market until that date.

The Fixed Internet Price Index (IPIF as per its acronym in Spanish) of the retail market measures the variations in price per unit of subscribed speed in Costa Rican households as of July 2018; this allows SUTEL to analyze the market trends associated to these services.

To calculate IPIF, the following must be taken into account:

- This analysis only includes the four operators with the largest market share (i.e.: Kölbi, Tigo, Cabletica and Telecable), which together account for 95 % of the total subscriptions. Even though there are a total of 18 operators that provide fixed Internet services nationwide, the remaining operators only represent between 0 % and 1 % of the market share. As such, given that any commercial activity that these operators may undertake will not significantly affect the results of the price index, they are not included in the analysis.

- The analysis only includes commercial offers targeted at households (residential services) that are provided under a single service contract (not bundled with other services).

- The type of technology through which the operator provides the Internet service (xDSL, HFC, FTTx or wireless) is not relevant for the purposes of this calculation. In regard to the operators' perception of competitors in the market, this analysis only includes prices given that obtaining a better price, and not a better quality service, is the primary influencing factor

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21   The sum of the revenue from prepaid subscriptions and the revenue from postpaid subscriptions earned during the month of analysis.

22   It is satisfied that $\pi PT_{m_1} + \pi PR_{m_1} = 1$

23   SUTEL (2016). An assessment of the retail market for residential fixed Internet services, an analysis of the level of competition in said market, and a declaration of the most relevant operators and imposed obligations (RCS-258-2016). Retrieved from: https://www.sutel.go.cr/sutel/resoluciones?field_tipo_documento_tid=All&=Aplicar

24   Since the Internet has unlimited data, commercial offers are presented in terms of the subscribed speed.

in the end consumer's purchase decision (according to report RCS-258-2016).

Furthermore, given that fixed Internet services have similar characteristics, levels of quality, and pricing, all technologies are considered to be part of the same relevant market for the purposes of this report. As such, the key influencing factor in the end consumer's purchase decision is the Internet speed that they require.

- These operators offer their customers a wide range of Internet speeds. However, given that the level of quality and the amount of data consumption in households is significantly lower than in businesses, this report does not include all the available speeds in the market.

For the purposes of this analysis, a maximum speed of up to 100 Mbps will be taken into consideration for each operator. This decision is predicated on the fact that, in regard to residential fixed Internet services, most operators offer a maximum speed of up to 100 Mbps. Moreover, considering the household spending results reported in the 2013 National Survey of Household Income and Expenditures (ENIGH as per its acronym in Spanish), and the relative weight of the spending structure, if said results were to be extrapolated to 2018, household spending on communication services would fluctuate between 13,000 and 64,000 colones at different quintiles of household income, with an average of 36,000 colones. These results were then compared to the average value of packages that offer more than 100 Mbps, which amount to a value of more than 50,000 colones.

With this context, it is very unlikely that a household would purchase a speed that is greater than 100 Mbps, as this far exceeds the estimated average household spending on communication services reported in the ENIGH.

- The commercial offers that account for 80 % of the total fixed Internet subscriptions per operator were selected for analysis in this report. Furthermore, this analysis includes plans that

are currently commercially available, and plans that are not be available to new subscribers but maintain active subscriptions.

- The prices under analysis only reflect the cost of the fixed Internet service and do not include the cost of the modem or the installation.

- The reference month is July 2018.

Indicator Calculations

1. To calculate the unit price (PIF_{i,v,m_1}), the price of the offer is divided by the number of Mbps provided in the commercial offer under analysis.

$$PIF_{i,v,m_1} = \frac{PIF_{i,v,m_1}}{Cant\ Mbps_{v,i,m_1}}$$

2. To calculate the average unit price per operator ($PMedIF_{i,m_1}$), every unit price of each operator (i) in the month of analysis (m_1) is weighted by the share it represents of the revenue earned in the reference month (δ_{i,v,m_1}).

$$PMedIF_{i,m_1} = \sum_{v=1}^{v=n} PIF_{i,v,m1} \cdot \delta_{i,v,m_1}$$

3. To calculate the national average price PIF_{m_1}, a weighted average $PMedIF_{i,m_1}$ is calculated by using the share that each operator represents in relation to the total revenue from fixed Internet services in the month of analysis ($\beta IF_{i,m_1}$).

$$PIF_{m_1} = PMedIF_{i,m_1} \cdot \beta IF_{i,m_1}$$

4. Finally, once the relative percentage change of national prices in the reference month is obtained ($\Delta PIF_{i,v,m_1}$), it is possible to calculate the monthly price index for fixed Internet services nationwide (ΓIF_{m_1}).

$$\tilde{I}IF_{m_1} = \Delta PIF_{i,v,m_1} = \frac{PIF_{m_1}}{PIF_{m_0}}$$

According to conventional theory, price indicators should be weighted on the basis of household spending in goods and services. For the purposes of this analysis, however, since the results of household spending with respect to fixed Internet services are not available, the revenue earned by the operators for said services is used instead.

Nomenclature

Cant= number of megabytes.

IF= Fixed Internet

i= Service providers, where 1= Kölbi, 2= Tigo, 3= Liberty Servicios Fijos LY S. A., and 4= Telecable

m_0= reference month

m_1= month of analysis

n= number of packages of a given operator **(i)** that were selected in the month of analysis **(m_1)**

v= speed of commercial offer

Methodology for calculating the international call price index

One of SUTEL's objectives is the implementation of methodologies that measure how prices behave in the telecommunications market. In furtherance of the foregoing, the need for a tool that can monitor the price of international calls was identified.

This service has shown a decline in revenue due to the adoption of technologies such as Internet calls and other platform-based solutions. However, it continues to serve a significant market niche to such an extent that the different mobile and fixed telephony operators continue to provide this service.

This methodology measures how prices behave in the residential sector with respect to mobile and fixed telephony prices.

This service accounts for 5 % of the total revenue from fixed telephony services, and 3.8 % of the total revenue from mobile telephony services, which explains why monitoring this service is so important.

International call services are currently provided by 15 operators, and have potential access to over 8 million lines.

On account of the above, the international call price index for fixed and mobile telephony services in the retail market measures the variations in price per minute of calls made to different destinations as of July 2020; this allows SUTEL to analyze the market trends associated to these services in terms of price.

To calculate this index, the following must be taken into account:

1. The operators with the largest market share with respect to outbound international call traffic are Kölbi (fixed and mobile services), Claro and Liberty Telecomunicaciones de Costa Rica LY S. A., which together represent 86 % of the total traffic of the 15 operators that provide international call services. Given that the remaining operators only accounts for approximately 14 % of the market share, not including this data will not significantly affect the results.

2. After consulting the operators, the countries with the highest outbound traffic originating within national territory (and which account for at least 80 % of the total) are determined on a monthly basis. Consequently, the five most significant destinations are determined in accordance with the total traffic perceived by the aforementioned three operators.

3. An analysis is then conducted with regard to the fixed telephony services provided by Kölbi to determine the price per minute at the household level, and then with regard to the mobile telephony services provided by the mobile network operators to determine the price per minute of calls made to the countries and destinations determined in accordance to Item #2 above.

4. The analysis only includes the prices of services targeted at households (residential fixed telephony services) and mobile users, and that are provided under a single service contract (not bundled with other services).

5. The unit price per international call minute is not considered within the analysis of postpaid plans because operators do not differentiate between destinations. These minutes count towards the total minutes provided by the different subscription plans regardless of whether they are national or international call minutes, as is the case with operators that offer minutes to other countries within their local network.

6. Postpaid and prepaid packages that specifically focus on the provision of international minutes are not included in the month of analysis because operators do not classify minutes in accordance with their destinations. It is therefore assumed that any minute of usage in this report refers to domestic minutes, since the minutes of the different packages are charged as domestic minutes regardless of the destination.

7. The overage price of postpaid and prepaid plans may be used depending on the international destination of the calls made.

8. The prices under analysis only reflect the cost of the international call service and do not include the cost of the modem (VoIP) or the installation.

9. The month of reference is July 2021 (reference month).

10. Only the price of calls made through fixed and mobile networks are included in the analysis; the price of calls made through other platforms, such as Skype or Gmail, are not taken into account.

11. The weight of the international call packages is calculated in terms of the price per minute of postpaid and prepaid plans for each operator in July 2020.

Index Calculations

1. The five most significant (international) destinations are determined in accordance with the traffic perceived by each operator per type of telephony service (whether it is a fixed telephony service, or a prepaid or postpaid mobile telephony service).

2. The market price offered by each operator is then calculated, per type of telephony service (whether it is a fixed telephony service, or a prepaid or postpaid mobile telephony service), for each of the destinations.

$$PMI_{m_1} = PMI_{1,m_1} * \beta_{1,m_1} + PMI_{2,m_1} * \beta_{2,m_1} + PMI_{3,m_1} * \beta_{3,m_1}$$

The price of calls made to these destinations is then weighted by the share of revenue that they represent in relation to the total revenue earned per type of telephony service.

3. The weighted price per operator is then calculated for each of the destinations.

$$PMI_{i,n=A,m_1} = PI_{i,A,m_1,TF} * \beta TF_{i,m_1} + PI_{i,A,m_1,Post} * \beta Post_{i,m_1} + PI_{i,A,m_1,prep} \\ * \beta Prep_{i,m_1}$$

The price per operator is then weighted by the share of revenue that they represent in relation to the total revenue earned by destination.

4. The average price for the reference month is estimated by calculating the weighted sum of the prices per operator obtained in Item #3 above.

$$PMI_{i,m_1} = PI_{i,A,m_1} * \beta_{i,A,m_1} + PI_{i,B,m_1} * \beta_{i,B,m_1} + PI_{i,C,m_1} * \beta_{i,C,m_1} + PI_{i,D,m_1} \\ * \beta_{i,D,m_1} + PI_{i,E,m_1} * \beta_{i,E,m_1}$$

5. Finally, once the relative percentage change of national prices in the reference month is obtained (ΔPMI_{m_1}), it is possible to calculate the monthly price index for international call services nationwide (ΓIM_{m_1}).

$$\tilde{I}IMI_{m_1} = \Delta PMI_{m_1} = \frac{PMI_{m_1}}{PMI_{m_0}}$$

Nomenclature

MI= international minute.

i= service providers, where 1= Kölbi, 2= Claro, 3= Telefónica.

m_0= reference month.

m_1= month of analysis.

n_1= number of destinations of a given operator **(i)** that were selected in the month of analysis **(m_1);** A; B; C; D and E

OVERALL
EVOLUTION OF THE SECTOR

COMMERCIAL OFFERS OF TELECOMMUNICATION SERVICES IN 2024

By 2024, there were 177 licensed telecommunications operators and service providers (some still in the process of commercial activation). This implies a greater number of telecommunications service providers analyzed, with an increase of 8 compared to 2023 and 19 compared to the total registered in 2020.

In this regard, it is important to note that although the 2021-2023 period had particularities that affected the market and the economy in general, new operators were registered, a large number of operators submitted requests for extensions of their licenses to remain in the market, in other cases, companies had their authorizations revoked, and several companies sought to enter the market for new telecommunications services. This makes it clear that the market is undergoing commercial change, with new user demands converging with aggressive commercial offerings from operators.

In terms of the number of operators that provided information during the analysis period, according to the service they provide, 100 % of active operators reported information for fixed telephony, 100 % for mobile telephony, and 100 % for subscription television. In the case of fixed Internet, 79 operators reported, of which the top 10 operators with the largest market share cover 94.5 %.

Revenue behavior of the telecommunications sector

In 2024, the market generated 781,237 million colones in revenue, representing a nominal increase of 6.9 % compared to 2023. This increase reflects a rebound in overall national economic activity during this period (see Graph No. 1).

On the other hand, constructing the relationship between the sector's total revenue and gross domestic product at market prices (see Graph No. 2), in 2024 a ratio of 1.8 % is obtained. When compared to 2023, the indicator is practically the same (1.79 %).

In terms of revenue behavior at the service level (see Graph No. 3), in general terms, fixed telephony services (POTS and VoIP), mobile telephony (voice and SMS), dedicated lines, and Internet access show increases, changing the behavior of recent years, where only Internet access service had an increase in revenue. Noteworthy is the case of fixed telephony, whose revenues increased by 14 % in the last year of analysis, as well as Internet access services as a whole (fixed and mobile) and dedicated lines, which show an increase of 8.9 % and 5.2 % compared to 2023.

By 2024, the market generated 781,237 million colones in revenue

For 2024, the behavior recorded in 2023 is repeated in the case of data transfer revenues, which double mobile telephony revenues, with this service carrying the highest weight in the sector's revenues, validating the persistence of a change in the consumption patterns of current telecommunications users.

An analysis of each individual service reveals the following:

Mobile Telephony

Based on voice traffic, messaging, and roaming revenues, a total of 182,287 million colones is projected for 2024, representing a slight increase of 0.8 % compared to 2023. For the 2020-2024 period, the average annual growth rate is -3.00 %, as specified in Graph No. 3. Of the revenues reported in mobile telephony, 97 % comes from voice traffic, 2 % from messaging, and 1 % from roaming, with this percentage remaining virtually unchanged compared to 2023 (2.8 %).

Fixed telephony (POTS & VoIP)

For fixed telephony services (POTS and VoIP), revenues for 2024 totaled 32,220 million colones, representing an increase of 13.9 % compared to 2023. This service has shown a downward trend over the years, due to the decline in the plain old traditional service, which is evident when analyzing the average growth rate of this service for the period 2020-2024, which is -9.34 % on average per year (see Graph No. 3). This behavior is detailed below.

Plain old telephone service (POTS)

Revenue generated by plain old telephone service (POTS) has shown a downward trend throughout the previous measurements. Thus, this service shows a 20.0 % reduction in revenue generated in the last year and a negative average annual growth rate of 19.7 % for the period analyzed. The relative weight of this service in relation to total POTS decreased compared to 2023, from 86.6 % to 52.45 % in 2024.

Fixed VoIP telephony

Revenue associated with fixed VoIP telephony had been declining over the years, but in 2024 it experienced a significant increase of 84.1 % compared to 2023. The average annual growth rate since 2020 is 238.4 %.

Internet access (includes mobile Internet access)

In regard to Internet services, revenue has shown an upward trend with an average annual growth rate of 5.31 % from 2020 to 2024. By 2024, this service as a whole (mobile and fixed) generated 524,108 million colones, an increase of 8.9 % compared to 2023. It is important to note that revenue from fixed Internet represents 41.3 % and mobile Internet 58.7 %. The growth rates for the last year for the revenue generated by these services were 4.0 % and 10.1 %, respectively.

Dedicated lines

For 2024, 42,623 million colones are reported to have been generated by this service, representing an increase of 5.2 % compared to 2023. In this case, the average growth rate for the period from 2020 to 2024 is -3.59 % per year.

An analysis of the percentage weights for the revenue from each service in relation to the total revenue generated by the sector reveals two potential scenarios. The first totals the revenues from mobile telephony and Internet (mobile network) in the same category, followed by fixed Internet access, then plain old telephone service and VoIP telephony, and finally dedicated lines (see Graph No. 4). In the second scenario, fixed Internet access and mobile Internet revenues are added together in a single revenue line, followed by mobile telephony (voice only), plain old telephone service and VoIP telephony, and finally dedicated lines (see Graph No. 5).

In the first scenario, mobile telephony and mobile Internet access (mobile network) account for 63 % of revenues by 2024. This percentage has remained stable over the years, ranging from 61 % to 63 % during the period analyzed. In second place is fixed Internet service with 28 %, followed by dedicated lines with 5 % and plain old telephone service and VoIP telephony with 4 %. Mobile network telecommunications services account for almost two-thirds of the market.

In relation to the second scenario, Internet access services (fixed and mobile) are the most important, accounting for 67 % of revenue, followed by mobile telephony (voice only), which generates 23 %. This shows that consumer preference for data consumption is growing, compared to 2023, when the percentages were 66 % and 25 %, respectively. Finally, as in the first scenario, dedicated lines represent 5 % and fixed telephony contributes 4 %. In this scenario, Internet access and mobile telephony services together generate 90 % of the sector's revenue.

Subscription behavior in the telecommunications sector

An important aspect of the telecommunications market is to analyze the behavior of subscriptions to different services, given the role they play in the sector's growth. For this topic, Table No. 12 provides detailed information on the level of service penetration measured by number of inhabitants or households for the period under analysis (2020-2024).

Mobile Telephony

In 2024, mobile telephony services registered 6,977,935 subscriptions. There were 3,531,905 prepaid subscriptions and 3,446,030 postpaid subscriptions, representing 51 % and 49 % of the total, respectively.

Considering the total number of subscriptions, this service changed its behavior in 2024 compared to 2023. This is because in 2024, total subscriptions increased by 160,647, or 2.3 % overall. The increase

is occurring in the postpaid segment with 261,873, while in the prepaid there is a decrease of 101,226 compared to 2023. The penetration of this service in 2024 is 132 %, with an increase of 2 percentage points (pp) compared to 2023.

Fixed telephony (POTS & VoIP)

For fixed telephony services, the data on the number of subscriptions in general shows a decrease, in contrast to the trend in 2023, when an increase was detected, falling from 629,688 in 2023 to 608,667 in 2024, representing a decrease of 21,021 subscriptions (3 %). In terms of service penetration among the population and households, the figures for 2024 are 12 % and 34 %, respectively.

When separating plain old telephone service and VoIP telephony, it can be seen that the decreases are concentrated in POTS, where there were 40,558 fewer subscriptions compared to 2023 (13 %), while VoIP telephony service, on the contrary, registered an increase of 19,537 subscriptions (7 %).

In terms of service penetration in 2024, POTS penetration at the population level is 6 % and 18 % at the household level, showing a decrease compared to 2023 (7 % and 20 %), while VoIP service will be 5.4 % and 15.9 % respectively, in this case showing an increase compared to 2023 (5 % and 15 %).

Plain old telephone service (POTS)

Plain old telephone service subscriptions are declining, as demonstrated by the trend over the last 5 years; In 2024, there were 321,465 subscriptions, 182,811 fewer than in 2020 (504,276), with a negative average annual growth rate of 8.61% for the 2020-2024 period.

Fixed VoIP telephony

In the case of fixed VoIP telephony, although there is an increase in 2024, the trend over the last five years has been upward. This trend can be seen in the fixed telephony section.

Internet access (includes mobile Internet access)

For the first time in the analysis period, Internet access services (fixed and mobile) show a decrease in subscriptions compared to 2023. By 2024, there were 6,510,236 subscriptions, representing 176,858 more than the previous year. This increase can be analyzed more clearly by separating subscriptions into fixed wireline, fixed wireless, and mobile. Firstly, fixed-line subscriptions show an increase of 2 % (18,993 subscriptions), as do fixed wireless services with 25,721 more subscriptions, but mobile subscriptions show the largest increase of 131,144, representing 3 %.

Dedicated lines

The behavior of dedicated line service subscriptions has been variable during the analysis period, but in 2024 there is an increase in subscriptions compared to 2023, with 636 more connections.

Bundling of services

As part of the monitoring of the marketing of telecommunications services, indicators were implemented to monitor changes in the supply of such services. For this reason, the measurement of subscription bundling indicators began in 2019, so that for the 2024 measurement there are six consecutive annual measurements.

For the measurement, the term "bundling" was adopted as the set of telecommunications services, prepaid or postpaid, corresponding to a commercial offer that includes two or more of the following services: fixed telephony, mobile telephony, fixed Internet, and subscription television; marketed as a single offer, with a single bill and a single price for the set of services included in the package subscribed to under conditions that cannot be obtained by adding individual offers.

First, the presence of bundled versus individual subscriptions is analyzed. In the case of fixed Internet subscriptions, it can be seen that in recent years this service has been contracted in a bundled form, with 58 % of subscriptions being bundled in 2024 (detailed in Graph No. 6). In fixed telephony service, which has two modalities, for traditional or conventional service, the presence of bundled subscriptions is 28 %, while for VoIP service it is 79 % (Graph No. 7 and Graph No. 8). For subscription television, 75 % of subscriptions are associated with another service (Graph No. 9). It should be noted that during 2024, no network operator or provider marketed mobile telephone subscriptions bundled with another telecommunications service.

It is therefore important to identify which package has the highest number of subscriptions to determine the consumer habits of users. To this end, Graph No. 10 shows that the highest number of subscriptions are for the double play package of fixed Internet and subscription TV, followed by the triple play package of fixed Internet, subscription TV, and fixed VoIP telephony, followed by the fixed Internet-fixed VoIP telephony package and, finally, fixed VoIP telephony with subscription TV.

Kilometers of Fiber

The importance of technological change in achieving higher Internet access speeds and other telecommunications services is evident. To this end, the performance of fiber kilometers in recent years is measured. As shown in Graph No. 11, by 2024, 112,796 kilometers of fiber had been installed, while by 2023, the figure was 98,044, showing a 15 % growth in this indicator.

Total Investment

Total investment in the telecommunications sector has shown no growth in the last four years, but by 2024 this indicator had fallen slightly, representing 0.30 % of GDP in that year, compared to 0.33 % in 2023. When comparing investment with the country's gross capital formation, there is a decrease compared to the previous indicator, in this case the proportion fell from 1.78 % to 1.67 % compared to 2023.

Human resources employed

In the case of human resources directly associated with telecommunications services for 2024, the number of personnel hired directly associated with the provision of telecommunications services increased by 141 people, representing a 1 % increase compared to 2023 (see Graph No. 14).

When comparing the human resources employed in the sector in relation to the country's labor force, the indicator shows a slight decrease compared to 2023, but with stability throughout the analysis period (see Graph No. 15). In the case of the sector's workforce and the total population, as shown in Graph No. 16, there are no significant changes over time, with a slight increase in the last year.

An analysis of the behavior of the female population working in the telecommunications sector shows an increase in numbers compared to 2023 (494 more women). On this occasion, this indicator shows a slight increase to 2024, with a cumulative growth rate of 2.4 % compared to 2020.

"
By 2024, total investment in the telecommunications sector decreased slightly
"

GRAPH 1. COSTA RICA: Total revenue of the Telecommunications Sector, 2020−2024

(annual figures in millions of colones and percentage change)

	2020	2021	2022	2023	2024
Millions of colones	729,200	731,357	730,898	730,947	781,237
Rate of change	-4.7 %	0.3 %	-0.1 %	0.0 %	6.9 %

■ Millions of colones   – – Rate of change
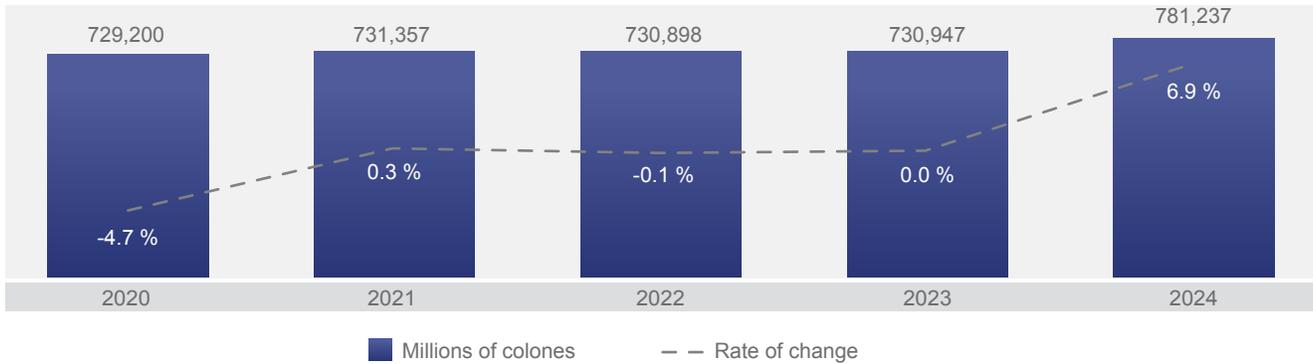
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 2. COSTA RICA: Total revenue generated by the Telecommunications Sector expressed as a share of GDP[1], 2020-2024

(yearly figures in percentage terms)

2020	2021	2022	2023	2024
2.1 %	2.0 %	1.9 %	1.79 %	1.8 %
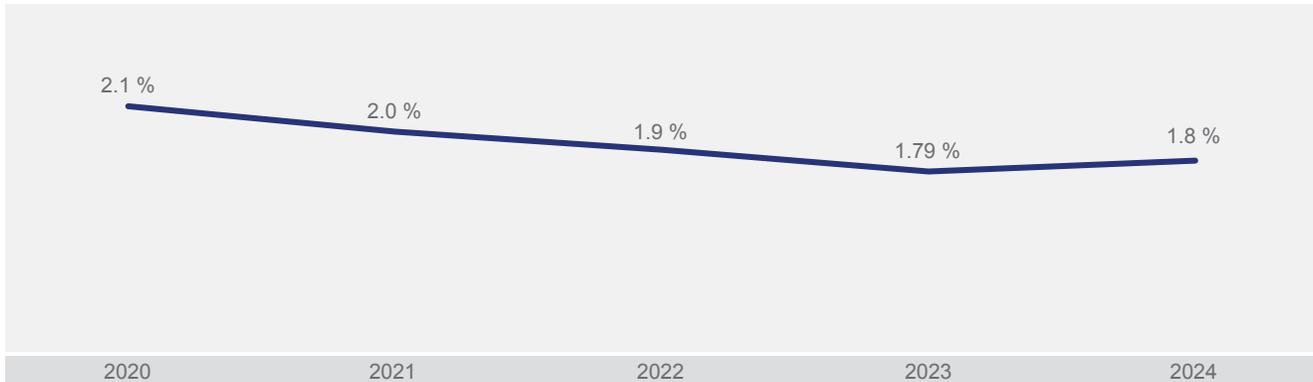
Note: 1 The gross domestic product was measured with current market prices.

Source: SUTEL, General Directorate of Markets & Central Bank of Costa Rica (BCCR). Costa Rica, 2024.

GRAPH 3. COSTA RICA: Total revenue generated by the Telecommunications Sector per type of service, 2020-2024

(yearly figures in millions of colones)

	2020	2021	2022	2023	2024
Internet access (includes mobile Internet access)	426,237	447,224	468,290	481,334	524,108
Mobile telephony (Voice, messaging and outgoing roaming)	205,942	191,460	184,158	180,803	182,287
Traditional basic telephony and VoIP telephony	49,326	53,886	45,915	40,531	42,623
Dedicated lines	47,695	38,787	32,535	28,278	32,220

—— Mobile telephony (Voice, messaging and outgoing roaming)   •••• Internet access (includes mobile Internet access)
••• Traditional basic telephony and VoIP telephony   – – Dedicated lines

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 4. COSTA RICA: Total revenue generated by the Telecommunications Sector per type of service, 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Dedicated lines	7 %	7 %	6 %	5 %	5 %
Fixed Internet access	23 %	27 %	28 %	28 %	28 %
Traditional basic telephony and VoIP telephony	7 %	5 %	5 %	4 %	4 %
Mobile telephony and mobile Internet access (Mobile network)	63 %	61 %	61 %	63 %	63 %

- ■ Dedicated lines
- ■ Fixed Internet access
- ■ Traditional basic telephony and VoIP telephony
- ■ Mobile telephony and mobile Internet access (Mobile network)
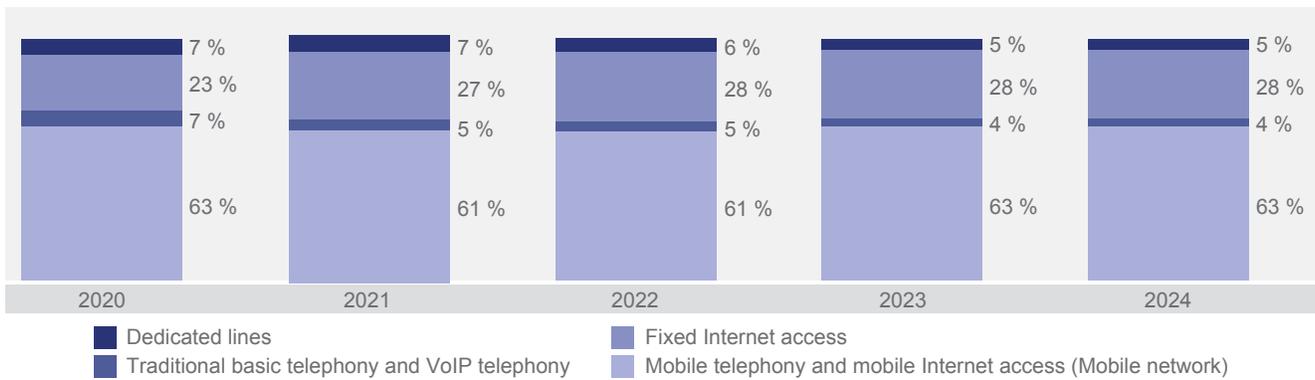
Note: The revenue from mobile telephony includes revenue generated by mobile Internet services.

Source: SUTEL, General Directorate of Markets & Central Bank of Costa Rica (BCCR). Costa Rica, 2024.

GRAPH 5. COSTA RICA: Total revenue generated by the Telecommunications Sector per type of service, 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Dedicated lines	7 %	8 %	7 %	5 %	6 %
Traditional basic telephony and VoIP telephony	6 %	5 %	4 %	4 %	4 %
Internet access (includes mobile Internet access)	58 %	61 %	64 %	66 %	67 %
Mobile telephony (Voice, Messaging and outgoing roaming)	28 %	26 %	25 %	25 %	23 %

- ■ Dedicated lines
- ■ Internet access (includes mobile Internet access)
- ■ Traditional basic telephony and VoIP telephony
- ■ Mobile telephony (Voice, Messaging and outgoing roaming)
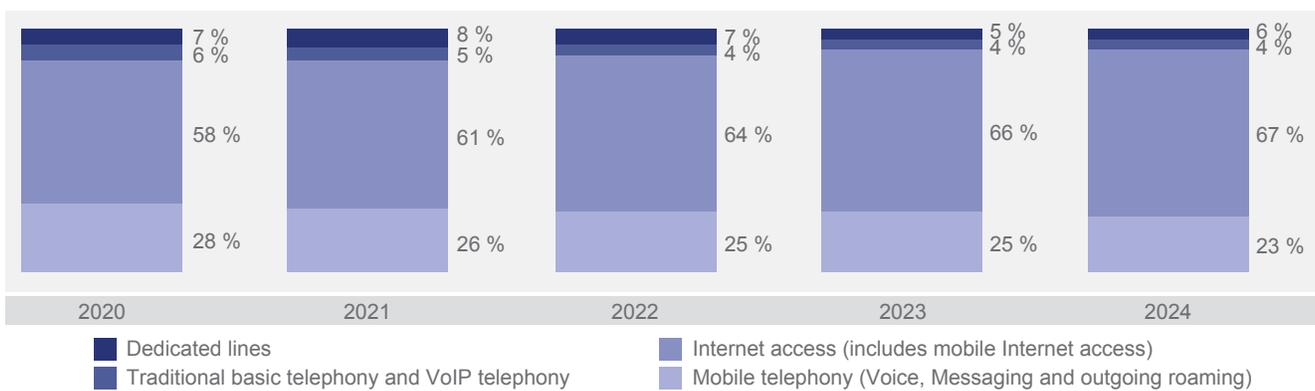
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 6. COSTA RICA: Distribution of fixed Internet subscriptions under single service contract or bundled with other services, 2020-2024

(figures in percentage terms)

	2020	2021	2022	2023	2024
Fixed Internet (Package)	63 %	60 %	58 %	59 %	58 %
Fixed Internet (Individual)	37 %	40 %	42 %	41 %	42 %

- ■ Fixed Internet (Individual)
- ■ Fixed Internet (Package)
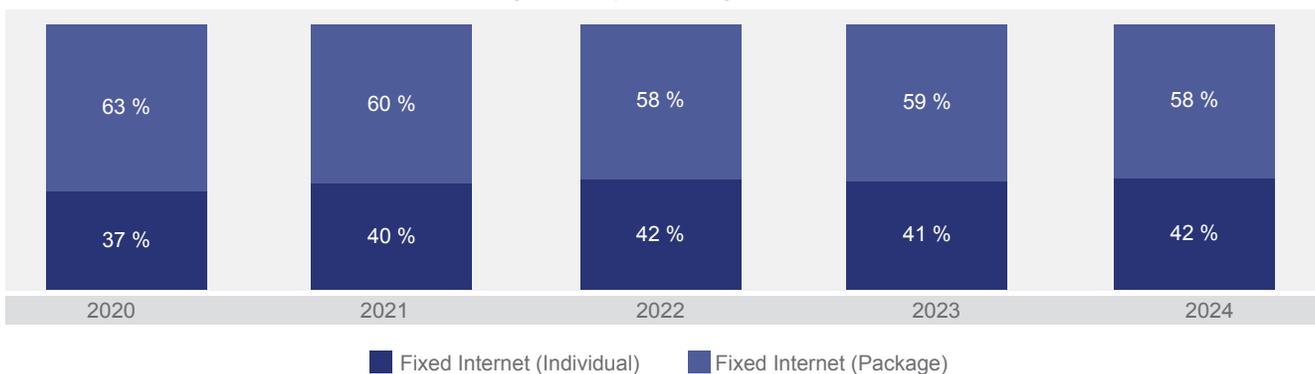
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 7. COSTA RICA: Distribution of fixed telephone VoIP subscriptions under single service contract or bundled with other services, 2020-2024

(figures in percentage terms)

	2020	2021	2022	2023	2024
Fixed VoIP Telephony (Package)	80 %	79 %	85 %	96 %	79 %
VoIP Fixed Telephony (Individual)	20 %	21 %	15 %	4 %	21 %

■ VoIP Fixed Telephony (Individual)　■ Fixed VoIP Telephony (Package)
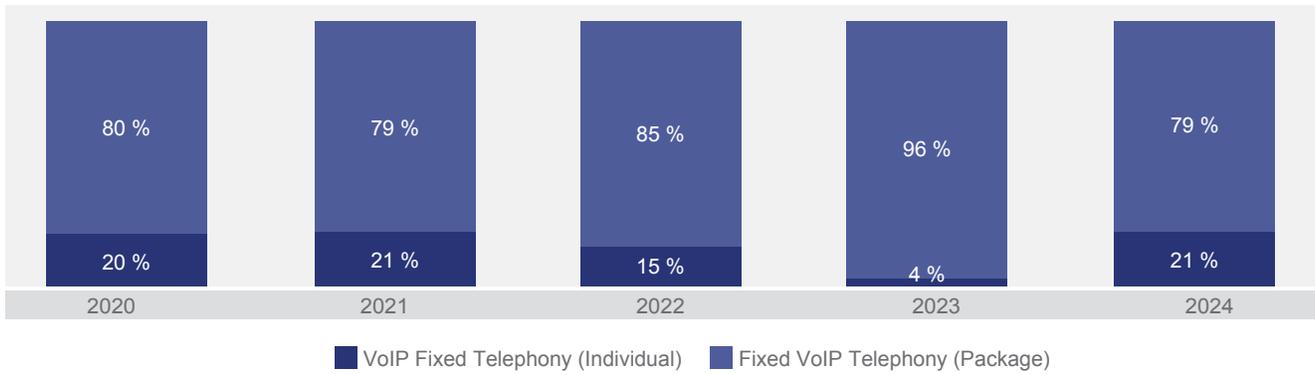
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 8. COSTA RICA: Distribution of Plain Old Telephone Service (POTS) subscriptions under single service contract or bundled with other services, 2020-2024

(figures in percentage terms)

	2020	2021	2022	2023	2024
Traditional Fixed-Line Telephony (Package)	28 %	29 %	28 %	28 %	28 %
Traditional Fixed Telephony (Individual)	72 %	71 %	72 %	72 %	72 %

■ Traditional Fixed Telephony (Individual)　■ Traditional Fixed-Line Telephony (Package)
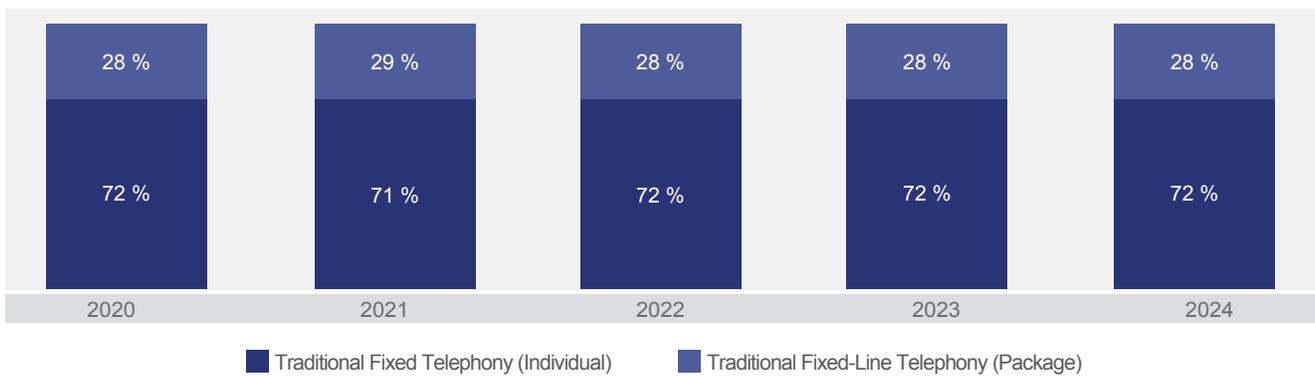
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 9. COSTA RICA: Distribution of TV subscriptions under single service contract or bundled with other services, 2020-2024

(figures in percentage terms)

	2020	2021	2022	2023	2024
TV (Package)	69 %	68 %	64 %	73 %	75 %
TV (Individual)	31 %	32 %	36 %	27 %	25 %

■ TV (Individual)　■ TV (Package)
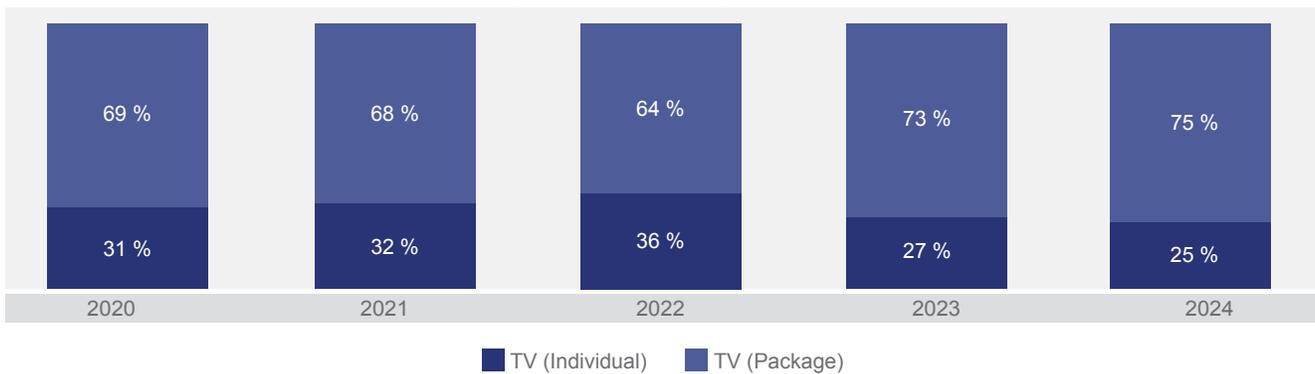
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 10. COSTA RICA: Number of subscriptions per type of telecommunication service package, 2020-2024

	Fixed Internet-Fixed Telephony VoIP	Fixed Internet-TV	Fixed Telephony VoIP-TV	TV-Fixed Internet-Fixed VoIP Telephony
2020	6,525	398,201	997	33,968
2021	5,725	493,505	735	46,923
2022	8,133	503,898	559	65,612
2023	20,535	497,261	281	94,639
2024	75,173	553,632	529	169,718
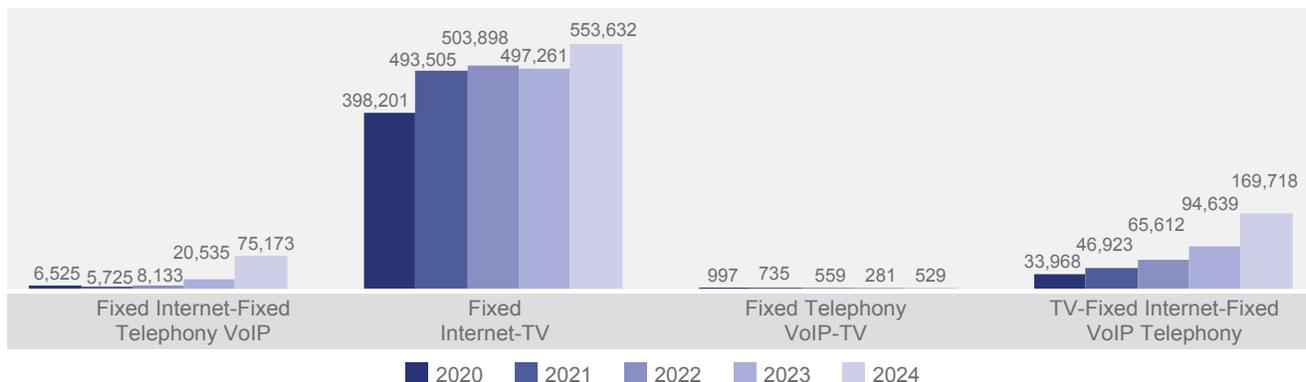
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 11. COSTA RICA: Kilometers of optical fiber in operation. 2020-2024

2020	2021	2022	2023	2024
61,944	66,162	77,170	98,044	112,796
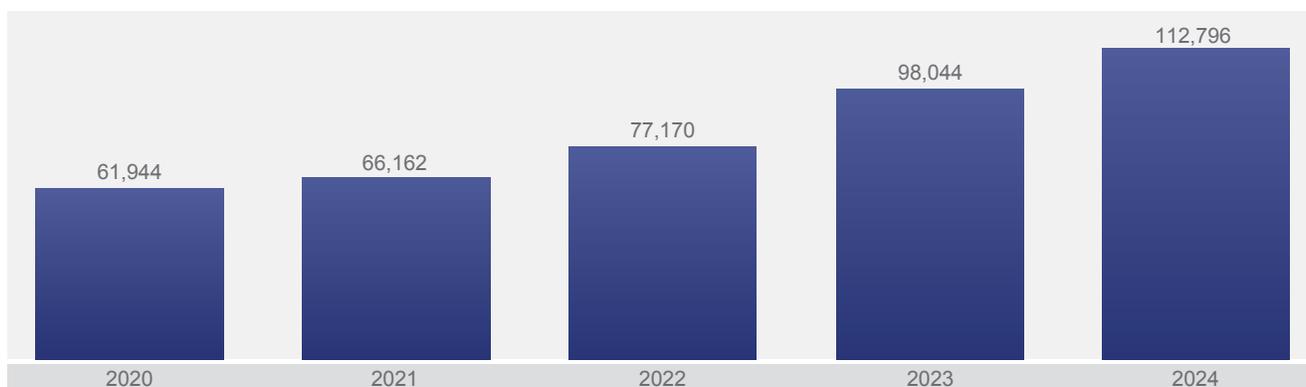
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 12. COSTA RICA: Total investment in the Telecommunications Sector expressed as a share of GDP[1], 2020-2024
(yearly figures in percentage terms)

2020	2021	2022	2023	2024
0.2 %	0.6 %	0.4 %	0.33 %	0.3 %
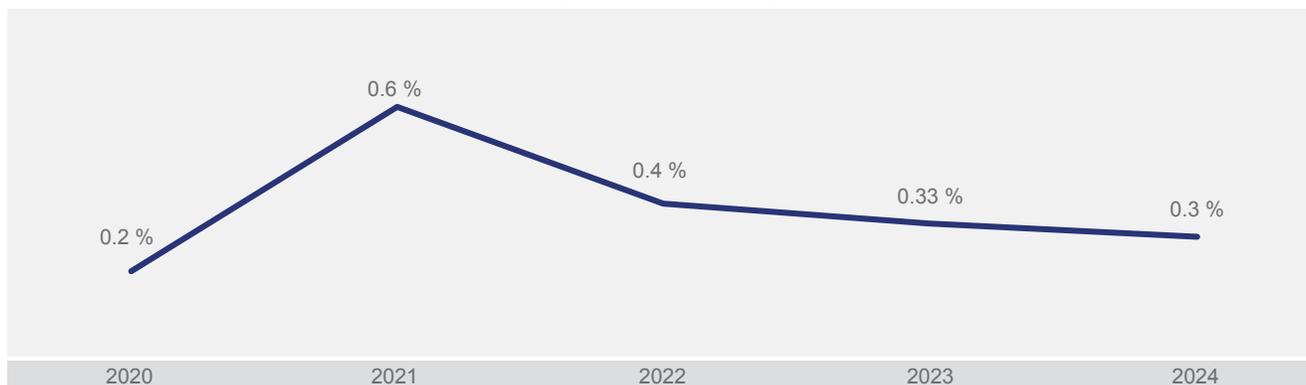
Note: 1 The gross domestic product was measured with current market prices.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 13. COSTA RICA: Total investment in the Telecommunications Sector expressed as a share of Gross Capital Formation. 2020-2024

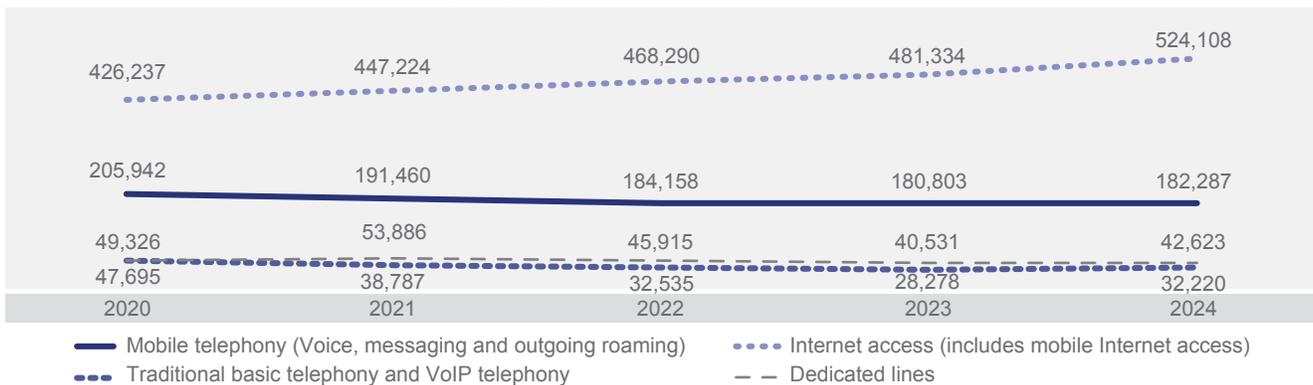(yearly figures in percentage terms)
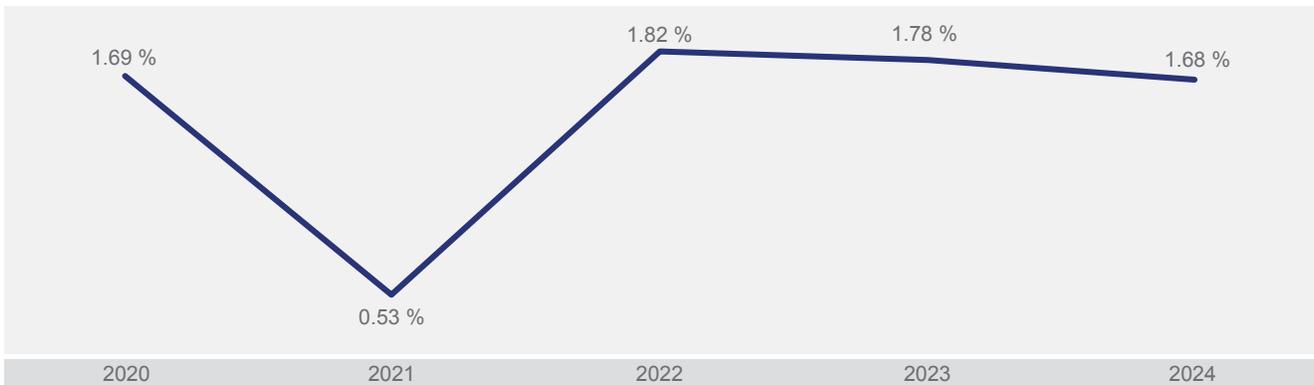
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 14. COSTA RICA: Telecommunications Sector Workforce, 2020−2024

(yearly figures)

People   — — % change
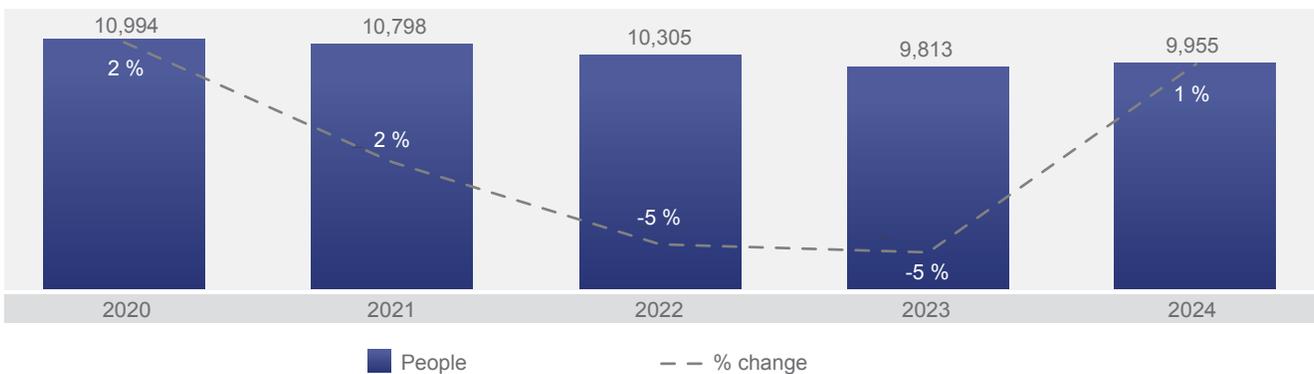
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 15. COSTA RICA: Percentage of the Telecommunications Sector's workforce in relation to the economically active population, 2020-2024

(yearly figures in percentage terms)
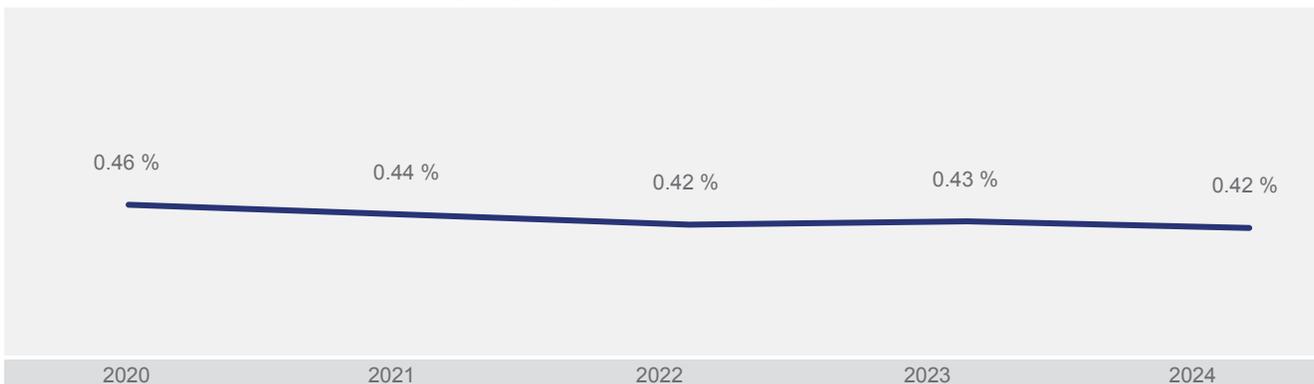
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 16. COSTA RICA: Proportion of the Telecommunications Sector's workforce in relation to the economically active population, 2020-2024
(yearly figures in percentage terms)

| 0.22 % | 0.21 % | 0.20 % | 0.19 % | 0.19 % |
| 2020 | 2021 | 2022 | 2023 | 2024 |
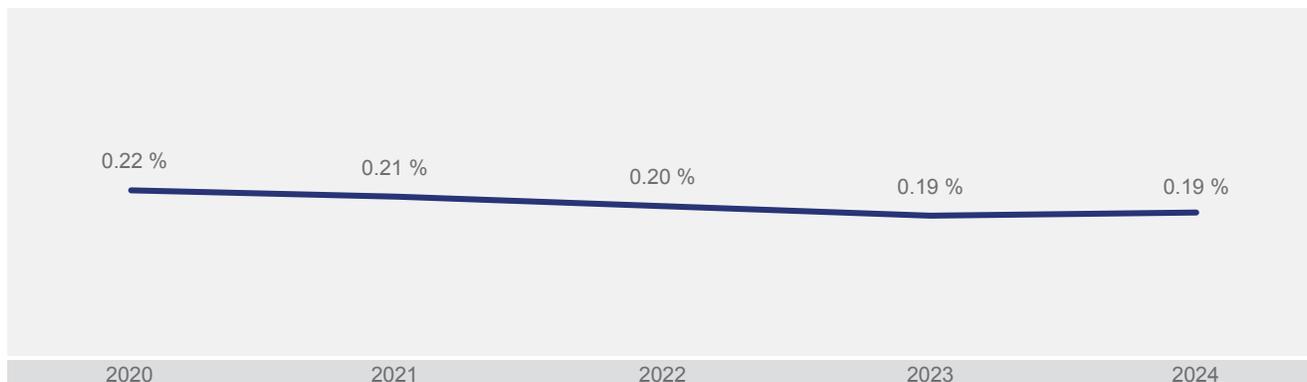
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 17. COSTA RICA: Telecommunications Sector's Female Workforce, 2020-2024

| 3,279 | 3,227 | 3,578 | 3,213 | 3,707 |
| 2020 | 2021 | 2022 | 2023 | 2024 |
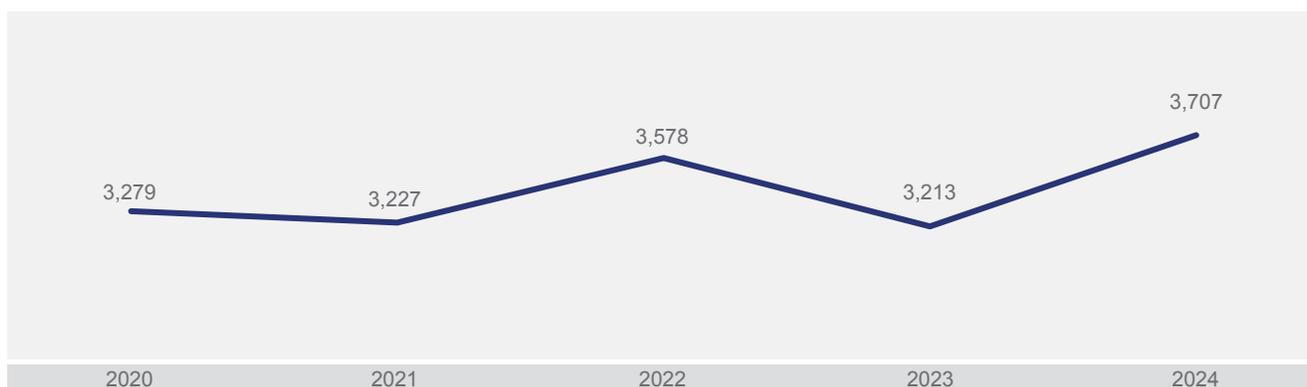
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 10. COSTA RICA: Number of Telecommunications Operators and Service Providers, 2020−2024
(quarterly figures in millions of colones)

Indicator	2020	2021	2022	2023	2024
Total number of authorized companies	158	187	163	169	177
Response rate	77 %	86 %	83 %	82 %	86 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 11. COSTA RICA: Percentage distribution of companies by service included in the sector indicator report, 2020–2024

Service	2020	2021	2022	2023	2024
Fixed telephony	100 %	100 %	100 %	100 %	100 %
Mobile telephony	100 %	100 %	100 %	100 %	100 %
Data transfer*	60 %	60 %	60 %	72 %	70 %
Pay television	100 %	100 %	100 %	100 %	100 %

* The operators with the largest market share have been contributing market data over the years, thereby ensuring the comparability of the statistics. In fixed Internet, the ten operators with the largest market share will account for 94.9 % of the market in 2024.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 12. COSTA RICA: Summary of the Costa Rican Telecommunications Sector's key performance indicators, 2020-2024

Indicator	2020	2021	2022	2023	2024
Sector's aggregate data					
Total revenue (in millions of colones)*	729,200	731,357	730,898	730,947	781,237
Total revenue/GDP (in percentage terms)	2.09 %	1.96 %	1.88 %	1.79 %	1.83 %
Total investment/GDP (in percentage terms)	0.23 %	0.6 %	0.4 %	0.3 %	0.3 %
Total human resource employed	10,991	10,795	10,305	9,811	9,952
Total number of human resources under employment/Total economically active population	0.46 %	0.44 %	0.42 %	0.43 %	0.42 %
Fixed telephony					
Total Subscriptions	556,617	500,550	488,930	629,688	608,667
Total subscriptions/100 inhabitants	11 %	10 %	9 %	12 %	11.5 %
Total subscriptions/100 households	35 %	30 %	28 %	35 %	34 %
Total Plain Old Telephone Service (POTS) Subscriptions	504,276	443,684	410,454	362,023	321,465
Total POTS subscriptions/100 inhabitants	10 %	8.6 %	7.9 %	6.9 %	6.1 %
Total POTS subscriptions/100 households	32 %	27 %	24 %	20 %	18 %
Total VoIP subscriptions	52,341	56,866	78,476	267,665	287,202
Total number of public payphones	3,265	2,905	2,683	2,454	1,790

Indicator	2020	2021	2022	2023	2024
Mobile telephony					
Total Subscriptions	7,172,976	7,126,859	6,937,543	6,817,288	6,977,935
Prepaid subscriptions	4,666,498	4,431,924	3,935,108	3,633,131	3,531,905
Postpaid subscriptions	2,506,478	2,694,935	3,002,435	3,184,157	3,446,030
Total subscriptions/100 inhabitants	140 %	138 %	133 %	130 %	132 %
Prepaid subscriptions/Total subscriptions	65 %	62 %	57 %	53 %	51 %
Postpaid subscriptions/Total subscriptions	35 %	38 %	43 %	47 %	49 %
Data transfer					
Total Internet subscriptions	5,729,424	5,963,705	6,107,615	6,333,378	6,510,236
Total number of fixed Internet service subscriptions	992,725	1,058,767	1,105,670	1,149,933	1,194,638
Total number of fixed (wired) Internet service subscriptions	986,673	1,053,097	1,098,532	1,143,169	1,162,162
Total number of fixed (wireless) Internet service subscriptions	6,052	5,670	7,138	6,764	32,476
Total mobile Internet subscriptions	4,736,699	4,904,938	5,001,945	5,183,454	5,315,598
Total fixed Internet service subscriptions/100 inhabitants	19.4 %	20.5 %	21.2 %	21.9 %	22.6 %
Total fixed Internet service subscriptions/100 households	63 %	64 %	64 %	65 %	66 %
Total mobile Internet service subscriptions/100 inhabitants	93 %	95 %	96 %	99 %	100 %
Total mobile Internet service subscriptions/Total mobile telephony subscriptions	63 %	63 %	64 %	70 %	76 %
Total number of dedicated line connections	23,682	18,025	17,294	19,453	20,089
Pay television					
Total subscriptions	866,593	848,950	831,579	819,064	798,828
Total subscriptions/100 inhabitants	17 %	16 %	16 %	16 %	15 %
Total subscriptions/100 households	55 %	51 %	48 %	46 %	44 %
Reference indicators					
Total population	5,111,238	5,163,038	5,213,362	5,262,225	5,290,037
Gross Domestic Product at current market price (in millions of colones)**	34,893,724	37,256,836	38,843,177	40,938,205	42,755,147
Total households	1,581,585	1,650,361	1,722,602	1,778,254	1,808,710

* Does not include revenue from TV subscription services.

**In 2018, BCCR changed the base year used to calculate the GDP to 2012.

Source: SUTEL, General Directorate of Markets, INEC & BCCR. Costa Rica, 2024.

TABLE 13. COSTA RICA: Revenue, Traffic, and Wholesale Telecommunications Connections by Service Type, 2020–2024

Indicator	2020	2021	2022	2023	2024
Revenue					
Mobile telephony	25,062,144,573	21,825,994,618	20,895,123,329	18,304,550,544	13,422,405,067
Fixed telephony	2,044,980,389	2,361,834,809	2,545,677,539	2,139,799,127	1,128,825,367
Dedicated lines	10,689,673,663	12,395,368,808	14,407,231,426	14,018,707,952	16,549,357 799
Internet	8,887,264,289	11,336,675,119	10,431,006,886	11,165,826,771	9,990,276,398
Traffic					
Mobile telephony	33,807,087	24,253,904	27,297,204	22,443,067	21,021,372
Fixed telephony	3,789,174	3,041,283	929,888	1,207,181	865,461
Subscriptions					
Dedicated lines	5,409	4,329	3,868	6,119	6,626
Internet	918	2,553	2,442	2,777	2,812

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

STATISTICS OF THE GENERAL DIRECTORATE OF COMPETITION IN 2024

TABLE 14. COSTA RICA: Relevant actions in matters of defense and promotion of competition in the telecommunications sector, 2024

Topic	Total	Scope	Summary
Special competition/ antitrust proceeding	1	Transdatelecom S.A. & Cable Arenal del Lago S.A.	By Resolution RCS-177-2024 of September 12, 2024, it found Transdatelecom S.A. and Cable Arenal del Lago S.A. guilty of failing to report an economic concentration.
Advocacy actions	2	Promotion of competition in the telecommunications sector.	1. Report on informality and competition in the telecommunications market. 2. Report on regulatory asymmetries in the telecommunications sector.

Topic	Total	Scope	Summary
Concentrations that were notified and analyzed	3	1. Ideas Gloris S.A. and Livister Latam S.L.U.	1. Approved by applying the principle of "positive silence" in the face of the SUTEL Council's disagreement.
		2. Gold Data S.A. and Livister Latam S.L.U.	2. By Resolution RCS-246-2024 of December 11, 2024, the request for authorization of the concentration submitted in the second phase was approved without conditions.
		3. R&H Internacional Telecom Services S.A. and Redes Integradas Corporativas SRL.	3. By Resolution RCS-170-2024 of September 5, 2024, the request for authorization of the concentration submitted in the first phase was approved without conditions.
No. of market research studies conducted	2	Launch of two market studies.	1. Mobile ecosystem market study. 2. Market study on exit barriers for users of telecommunications services.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

RELEVANT ACTIONS IN MATTERS OF DEFENSE AND PROMOTION OF COMPETITION IN THE TELECOMMUNICATIONS SECTOR IN 2024

1. Non-reported concentration between Transdatelecom S.A. and Cable Arenal del Lago S.A.

In 2024, by resolution of the Sutel Council RCS-177-2024 of September 12, 2024, a special competition procedure was concluded to evaluate the alleged failure to report, in accordance with Laws 9736 and 8642, of an economic concentration between the companies Transdatelecom S.A. and Cable Arenal del Lago S.A. The investigation was initiated following a communication from Cable Arenal del Lago S.A. in 2021 regarding the transfer of its infrastructure use contract with Instituto Costarricense de Electricidad (Costa Rican Institute of Electricity) (ICE) to Transdatelecom S.A., which led to the start of the preliminary investigation stage. During the process, documentary and testimonial evidence was collected, verification visits were made, and data was compiled that made it possible to establish the nature of the transaction and its impact on the telecommunications market.

The analysis determined that the transfer of assets and customers to Transdatelecom S.A. by Cable Arenal del Lago S.A. constituted an economic concentration under the General Telecommunications Act, no. 8642. In accordance with the current regulatory framework, this type of transaction requires prior authorization to ensure competition and prevent monopolistic practices. During the proceedings, it

was verified that the transfer included infrastructure, rights of use of the network, and a customer portfolio, which allowed Transdatelecom S.A. to take over the operations of Cable Arenal del Lago S.A. in the region of Tilarán, Guanacaste, without formal notification to SUTEL, which represented a regulatory breach with possible sanctions.

In this particular case, circumstantial or indirect evidence played a key role. SUTEL was unable to prove through formal documentation the existence of a commercial agreement or economic transaction between the parties, but evidence was found that Transdatelecom S.A. began operations in a specific geographical area, using resources and infrastructure belonging to Cable Arenal del Lago S.A. It also took over part of the customer portfolio that belonged to Cable Arenal del Lago S.A. These behaviors served as indirect evidence that a concentration existed under the terms of Law 9736 without having been duly notified. In short, circumstantial evidence is justified by its ability to reveal patterns of behavior that, although not conclusive on their own, can together convincingly demonstrate an anti-competitive practice or an unreported concentration, thus protecting the principles of competition in the markets.

Consequently, the resolution concluded that the operation was carried out without the corresponding authorization, affecting the competitive balance of the sector. SUTEL, as the sectoral competition authority for the telecommunications market, assesses the applicable sanctions and corrective actions necessary to restore competitive conditions in the market. This case underscores the importance of monitoring and controlling competition indicators in the telecommunications sector, demonstrating the need for effective mechanisms to supervise market developments and ensure transparency in business transactions.

2. Advocacy actions to promote competition in the telecommunications sector

As part of the actions carried out in 2024 to foster a culture of competition, the following studies were published:

A. Report on informality and competition in the telecommunications market.

This study shows the economic and competitive impacts of informality and sets out as research objectives to determine how informality affects economic agents operating legally in the telecommunications market, as well as its impact on telecommunications service users and competition. The information required to carry out the study was obtained through a survey of telecommunications operators and service providers in Costa Rica and focused on subscription television and Internet access services. The analysis of the information revealed that informal companies offering telecommunications services incur lower initial and recurring costs as a result of evading compliance with regulations and payments such as taxes and intellectual property rights, thereby allowing illegal service provision to result in higher profit margins and making it possible to offer services at a lower market price in contrast to those companies that do comply. taxes and intellectual property rights, thereby allowing illegal provision to result in higher profit margins and making it possible to provide services at a lower market price in contrast to those companies that do so legally and in compliance with current regulations.

The study indicates that 60 % of network operators and telecommunications service providers in Costa Rica report being affected by this phenomenon in areas such as lower revenues and loss of customers, among others. In terms of the impact on service users, the study found that although the use of such illegal services is attractive to users due to their lower prices, it carries an implicit risk of vulnerability in the use of personal data, such as bank accounts, as well as the possibility of facing problems of poor quality, interruption in service continuity, and non-compliance, without users being able to make use of consumer protection mechanisms.

Furthermore, the study showed that the illegal provision of telecommunications services can affect assessments of the degree of competition in the markets, given the difficulty in identifying economic agents and their competitors.

B. Report on regulatory and legislative asymmetries in the telecommunications sector.

The study aims to determine the existence of regulatory and legislative asymmetries between network operators and service providers in the telecommunications market and their effects on the level of competition in the market. To this end, the study analyzes the regulatory framework applicable to budgetary oversight, public procurement, administrative, technical, financial, and personnel management, as well as rights of way and use, radio spectrum allocation, concessions or authorizations, and tax treatment, in addition to the effects of the identified asymmetries on competition.

Among the findings of the study is that there are two types of network operators or telecommunications service providers in the telecommunications market: private and public operators, and that this distinction applies equally in the regulatory framework, one of which is oversight that is only applicable to public companies, generating higher costs for public network

operators or telecommunications service providers than for private ones.

The study also concludes that Section 3(b) of Law 9986 hinders the participation of private operators in the market for the procurement of telecommunications services by the State. It also points out that private network operators and service providers are governed by more flexible criteria for the acquisition of works, goods, and services, which allow for faster and more timely market reactions. It also indicates that the existence of differences in personnel management by public telecommunications operators has an effect on these companies. The study also explains how radio spectrum allocation regulations reduce the ability of private operators to compete with public telecommunications operators and providers, which have different concession terms, in some cases with indefinite frequencies or 99-year terms, among other elements discussed.

3.Concentrations submitted and analyzed:

In 2024, there was a significant increase in the number of transactions reported, six in total. Of these, three were approved, one by tacit consent due to the lack of confirmation from the SUTEL Council in the first months of the year. The remaining transactions continued with the analysis or admissibility stage in 2025.

A. Concentration between Ideas Gloris S.A. and Livister Latam S.L.U.

In January 2024, SUTEL received a notification of economic concentration submitted by the Spanish company Livister Latam S.L.U. regarding the acquisition of 100% of the shares of Ideas Gloris S.A. The evaluation of the transaction included consultation with the Commission for the Promotion of Competition (COPROCOM) and a detailed technical analysis by SUTEL's General Directorate of Competition. It was determined that the transaction did not pose

significant risks to competition in the fixed broadband Internet, dedicated links, and data center markets, due to the existence of multiple providers and the lack of dominant participation by the parties involved in those segments.

The evaluation process was subject to the concentration control regime of Law 8642. However, the final resolution could not be issued within the legal deadline, as the SUTEL Council was incomplete and unable to meet. In accordance with current regulations, the expiration of the deadline without an express resolution resulted in the automatic approval of the concentration without conditions, in application of the principle of "positive silence." Consequently, the authorization of the transaction was formalized, and Livister Latam S.L.U. was requested to officially report the moment the concentration materializes.

B. Concentration between Gold Data S.A. and Livister Latam S.L.U.

In May 2024, Livister Latam S.L.U. submitted a notification of economic concentration related to the acquisition of 100% of the shares of Gold Data Costa Rica S.A. As part of the process, an analysis was carried out to determine the possible effects on competition in the wholesale fixed Internet and wholesale dedicated links markets. It was found that the transaction could increase Livister Latam's market share, but without generating significant negative effects on competition due to the existence of multiple competitors and current regulations.

The analysis was carried out in two phases. In the first phase, potential risks to competition were identified, which led to the initiation of a second phase focused on the impact on wholesale markets. During this stage, elements such as market structure, barriers to entry, and the availability of competitive alternatives were considered. The results indicated that the concentration would not give the acquiring company a dominant position that would allow it to

impose prices or restrict supply to the detriment of other market players. In addition, the presence of regulations limiting the exercise of market power in the telecommunications sector was highlighted. In its final resolution RCS-246-2024 of December 11, 2024, the SUTEL Council approved the concentration without conditions, considering that it did not represented a significant risk to competition.

C. Concentration between R&H Internacional Telecom Services S.A. and Redes Integradas Corporativas SRL.

In June 2024, SUTEL received a notification of economic concentration submitted by R&H Internacional Telecom Services S.A. and Redes Integradas Corporativas S.R.L. (REICO), proposing the acquisition of REICO's fixed telephony customer portfolio by R&H. After analyzing the effects on the relevant market, it was determined that the transaction did not pose significant risks to competition, given the low number of customers involved and the competitive structure of the sector.

In the transaction under review, it was evident that the transaction had a marginal impact on the fixed telephony market, with an insignificant increase in R&H's market share and no effect on the competitive pressure exerted by other operators. In its technical report, COPROCOM concluded that there were no indications of anti-competitive effects resulting from the economic concentration. Furthermore, the Herfindahl-Hirschman Index (HHI), used to measure market concentration, did not reflect a significant change after the transaction.

Thus, the SUTEL Council decided in the first phase, through Resolution RCS-170-2024 of September 5, 2024, to approve the transaction without conditions, establishing that R&H and REICO should report when the transaction became effective.

4. Market Studies:

During 2024, two market studies were launched:

Mobile ecosystem market study. This market study aims to determine the impact of the digital economy on the mobile telecommunications market, identify relationships between over-the-top (OTT) and traditional services, and analyze the effects of digital services on competition.

Market study on exit barriers for users of telecommunications services. The market study aims to identify whether, between 2022 and 2024, telecommunications service providers in Costa Rica have implemented exit barriers that prevent or hinder consumers from terminating their contracts for fixed residential telecommunications services (fixed telephony, subscription television, and fixed Internet) and mobile telephony, as well as their impact on competition.

15 YEARS
of Telecommunications Sector Statistics

This section presents a summary of the 15 years during which SUTEL has collected indicators for the Costa Rican Telecommunications Sector. It analyzes variables such as revenue, investment, human resources, and the penetration of different services at the household and individual levels.

First, it analyzes the number of operators and providers that have participated in the information collection process. As shown in Graph No. 18, over the course of 15 years, the number of companies reporting information on different telecommunications services has increased. From the outset, there have been more than 100 companies, with the peak number occurring in 2021.

Along the same lines, reported revenues have averaged 655,043 million colones per year, with the most significant revenue growth occurring in the first five years. Since 2015, this variable has been declining, but at a steady rate, with revenue remaining above 741,982 million.

Investment has followed a similar pattern to revenue, with the highest amount of investment occurring in the first five years and stabilizing in the last ten years.

In the case of the workforce, the first 10 years showed steady growth, both in absolute terms and in relation to the country's economically active population. From 2017 onwards, a decline began, but without any sharp drops, stabilizing the workforce at an average of 10,000 people, as shown in detail in Graph No. 21. The female workforce in the telecommunications market has grown over the last 15 years, particularly in the last 10 years, when it exceeded 30 % of the total workforce, as shown in Graph No. 22.

In terms of the penetration of different telecommunications services over the last 15 years, as shown in Graph No. 23, fixed telephone and pay TV services have been losing market share, but fixed Internet service has been increasing every year during the period analyzed, at the household level.

In terms of penetration per capita, as shown in Graph No. 24, mobile telephone and Internet services showed the most significant growth in the first five years, resulting in similar penetration rates over the last ten years.

"Over the last 15 years, fixed telephone and pay television services have been losing market share"

GRAPH 18. COSTA RICA: Operators and providers authorized to market telecommunications services, 2010-2024

2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
54	108	118	117	122	139	135	143	152	148	158	187	163	169	177
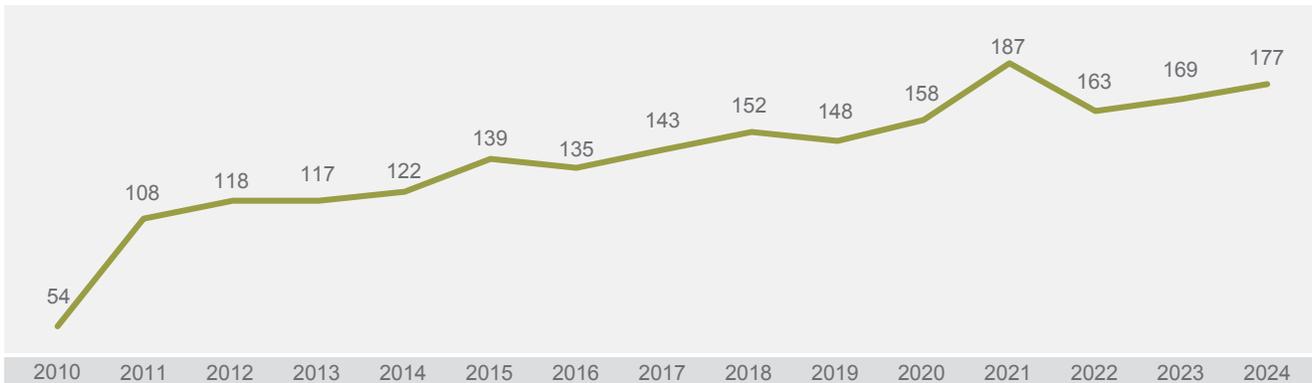
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 19. COSTA RICA: Total revenue of the Telecommunications Sector, 2010−2024

(annual figures in millions of colones and percentage change)

Variation — Telecommunications services revenue (colons)
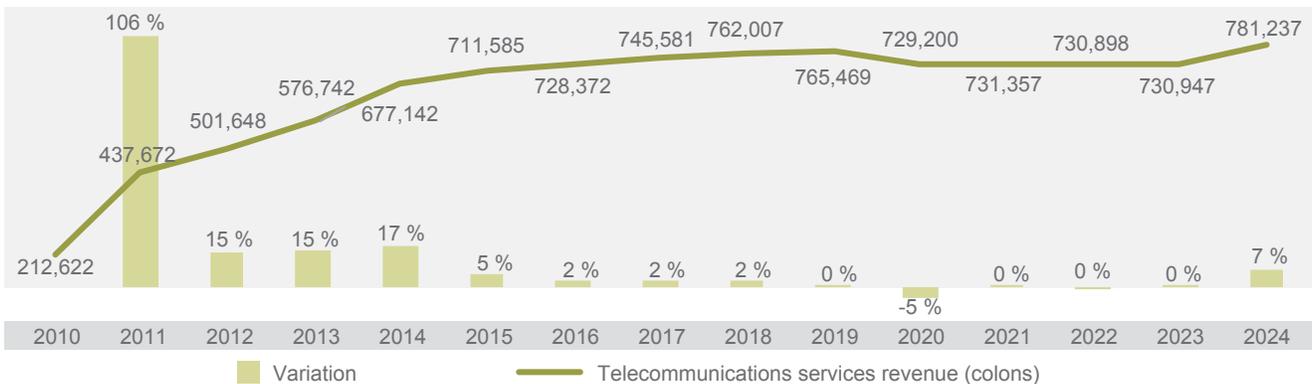
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 20. COSTA RICA: Total investment in the Telecommunications Sector expressed as a share of GDP, 2010-2024

(annual figures in millions of colones and annual figures in percentages)

Annual investment in telecommunications services — Total investment/GDP (percentage)
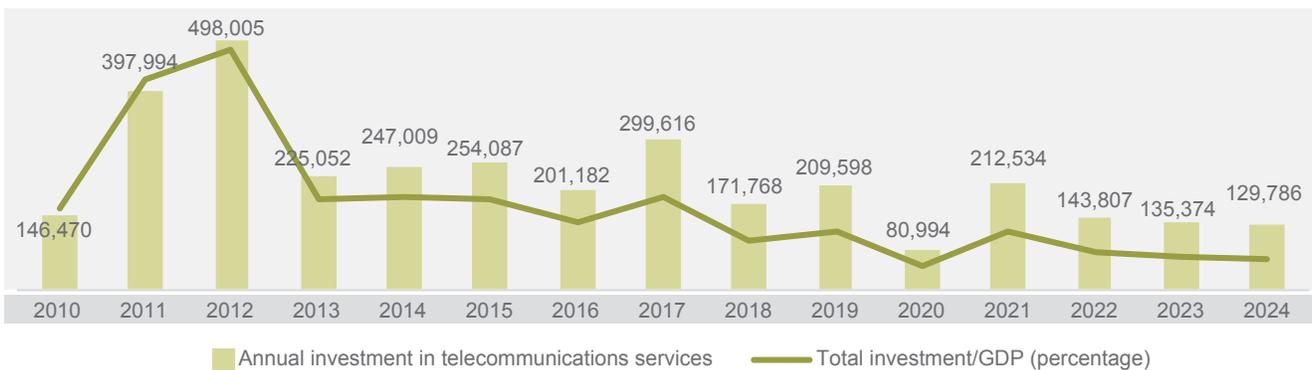
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 21. COSTA RICA: Percentage of the Telecommunications Sector's workforce in relation to the economically active population in 2010-2024

(annual figures in percentage terms)

Year	Telecommunications sector workforce	Total human resources employed/Total economically active population
2010	7,835	0.38 %
2011	9,618	0.45 %
2012	9,900	0.45 %
2013	10,442	0.47 %
2014	11,017	0.48 %
2015	11,426	0.50 %
2016	11,870	0.54 %
2017	12,186	0.54 %
2018	11,804	0.50 %
2019	10,761	0.44 %
2020	10,994	0.46 %
2021	10,798	0.44 %
2022	10,305	0.42 %
2023	9,813	0.43 %
2024	9,955	0.42 %

Total human resources employed/Total economically active population — Telecommunications sector workforce
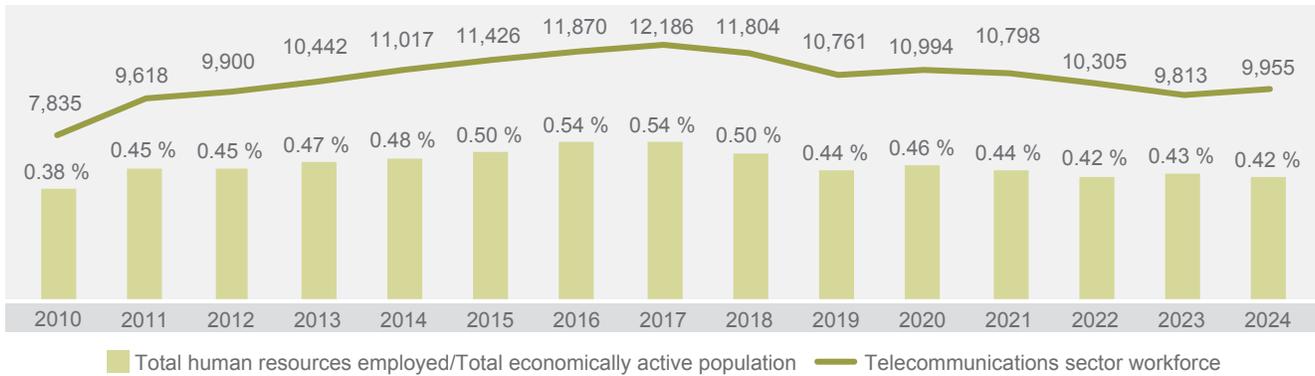
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 22. COSTA RICA: Telecommunications Sector's Female Workforce in 2010-2024

Year	Female workforce	Relative weight
2013	2,873	28 %
2014	2,914	26 %
2015	3,010	26 %
2016	3,061	26 %
2017	3,344	27 %
2018	3,258	28 %
2019	3,244	30 %
2020	3,279	30 %
2021	3,227	30 %
2022	3,578	35 %
2023	3,213	33 %
2024	3,707	37 %

Relative weight — Female workforce
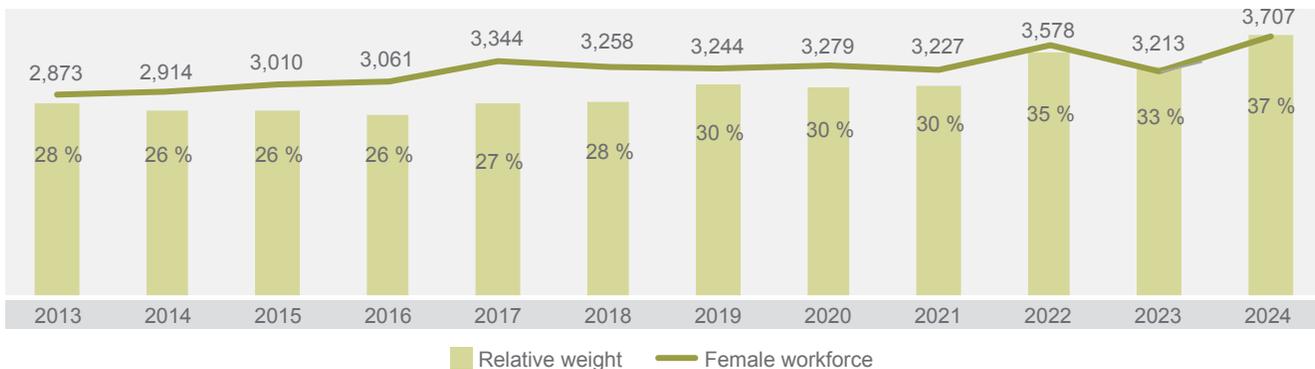
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 23. COSTA RICA: Penetration of fixed telephone, fixed Internet, and pay TV services at the household level, 2010-2024

Year	Fixed-line telephone penetration (residential)	Fixed Internet penetration (Housing)	Subscription Television Penetration (Housing)
2010	84 %	32 %	32 %
2011	80 %	32 %	38 %
2012	75 %	34 %	41 %
2013	72 %	36 %	48 %
2014	63 %	37 %	52 %
2015	59 %	39 %	56 %
2016	57 %	43 %	56 %
2017	54 %	50 %	56 %
2018	57 %	50 %	54 %
2019	54 %	40 %	57 %
2020	55 %	35 %	63 %
2021	55 %	30 %	64 %
2022	51 %	28 %	64 %
2023	46 %	35 %	65 %

Fixed-line telephone penetration (residential) — Fixed Internet penetration (Housing) ••• Subscription Television Penetration (Housing)

Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 24. COSTA RICA: Penetration of mobile phone services and mobile Internet per capita, 2010-2024

Mobile phone penetration (per inhabitant): 69 %, 90 %, 115 %, 150 %, 147 %, 156 %, 170 %, 157 %, 138 %, 145 %, 140 %, 138 %, 133 %, 130 %, 132 %

Mobile Internet penetration (Per inhabitant): 5 %, 35 %, 57 %, 75 %, 80 %, 86 %, 89 %, 97 %, 102 %, 92 %, 93 %, 95 %, 96 %, 99 %, 100 %

Years: 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024

— Mobile phone penetration (per inhabitant)   ···· Mobile Internet penetration (Per inhabitant)
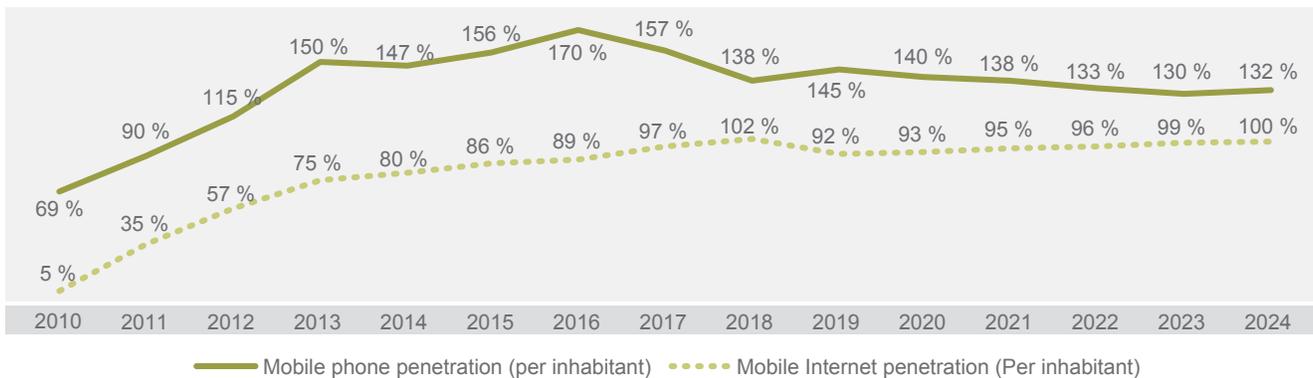
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

MOBILE TELECOMMUNICATIONS

To visualize the evolution of the services that comprise mobile telecommunications, namely: mobile telephony (national and international), roaming, and mobile Internet; we will address the most important aggregate indicators for each of them, allowing us to visualize their behavior over the last few years (2010-2024).

Mobile telephony

In terms of subscriptions, there has been a remarkable increase since 2010, from 3.1 million subscriptions to 7 million by the end of 2024, resulting in a compound annual growth rate of 5.9 %.

In terms of payment methods, from 2010 to 2013, prepaid increased its share to 80 % of subscriptions, but from 2014 onwards it began to lose ground to postpaid, to such an extent that by 2024 prepaid closed at 51 %, while postpaid rose from 23 % in 2014 to 49 % by the end of the year (see Graph No. 25).

With regard to voice traffic, it should be noted that this component peaked in 2014 (9,037 million minutes) and has been on a downward trend since then until 2024, reaching 3,398 million minutes.

At the user level, this means that in 2011 a postpaid user consumed 210 minutes per month and 66 minutes in 2024, while prepaid usage fell from 102 minutes to 15 minutes over the same period (see Graph No. 26).

As for messaging traffic (SMS and MMS), it began to decline in 2011, falling from 25,367 million messages to 1,502 million messages in 2024, representing an annual decrease of 19.5 %. This means that in 2011, each subscriber consumed 511 messages per month, falling to 18 messages per month by 2024 (see Graph No. 27).

Voice revenues began to grow in 2011 (195,910 million colones) and peaked between 2014 and 2015 (303,478 million colones), and then began to decline until 2023, with 2024 being the first year in which the trend reversed and began to rise, but remaining practically at the same level as the last three years (176,342 million colones in 2024).

At the user level, the data indicates that in 2017, the monthly voice revenue contributed by a postpaid user went from 7,210 colones to 3,802 in 2024, while prepaid went from 1,416 colones to 452 colones (see Graph No. 28).

Roaming

In terms of outgoing roaming, voice traffic began to grow in 2011, rising from 2.4 million minutes to 11 million minutes in 2019. Then, during the pandemic (2020), it fell to 4.1 million minutes and has remained at very similar levels in subsequent years, reaching 5.7 million at the end of 2024.

In the case of outgoing data roaming traffic, since 2013 (2 TB per year) it has maintained its upward trend, with the exception of 2020 (it went from 304 TB in 2019 to 236 TB in 2020). However, from that year onwards, its upward trend rebounded to reach 1,575 TB by 2024 (84 % compound annual growth) (see Graph No. 29).

Revenues have been volatile, as consumption of this service depends on external factors (economic, political, among others) since it is a "travel abroad" service. However, it should be noted that its peak in terms of revenue was between 2013 and 2016, reaching figures of 6,760 million colones (2013), but by 2020 it fell to 1,281 million (pandemic year) and from there it began to increase but not to the historical figures mentioned above, closing 2024 with 2,596 million colones. It is important to note that since 2017, the share of data in revenues has tended to rise (from 36 % in 2017 to 79 % in 2024) (see Graph No. 30).

Mobile Internet

Mobile Internet is a service that has experienced recognized growth worldwide, and Costa Rica is no exception, as by 2010, subscriptions rose from 606,215 to 5,315,598 by the end of 2024, representing a 16.8 % compound annual growth rate.

It is important to note that the share of postpaid plans has increased steadily from 18 % in 2012 to 59 % in 2024 (see Graph No. 31).

Data traffic has been on an upward trend since 2014, rising from 42,721 TB to 477,399 TB in 2024 (representing a compound annual growth rate of 27.3 %). At the user level, this means that in 2014, a postpaid user consumed 1.98 GB per month, compared to 11.26 GB today (19.8 % annual growth), while prepaid users went from 0.59 GB to 2.14 GB (13.8 % annual growth) during the same period. In other words, for every GB of prepaid data consumed, 3.35 GB of postpaid data was consumed in 2014, while by 2024 this ratio had increased to 5.26 GB (see Graph No. 32).

Finally, mobile Internet revenues, driven mainly by the above-mentioned traffic, have tended to rise, from 24,221 million colones in 2011 to 307,494 million in 2024 (the highest figure recorded), representing an annual growth of 21.6 %.

In terms of revenue per user, in 2013 a postpaid user contributed 4,552 colones, while their prepaid counterpart contributed 1,532 colones, meaning that for every colón generated by prepaid users, 2.97 colones were generated by postpaid users. By 2024, postpaid users will contribute 6,706 colones compared to 1,902 colones for prepaid users (3.52 colones postpaid for every colón prepaid), showing, as with traffic, a growing share of postpaid service and, therefore, wider ratios or gaps between these types of service (see Graph No. 33).

GRAPH 25. COSTA RICA: Total subscriptions and subscriptions by payment method for mobile phone services, 2010-2024

(figures in millions of subscriptions and percentages)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Subscriptions	3.1	4.1	4.8	6.0	6.2	6.7	7.4	7.8	6.9	7.3	7.2	7.1	6.9	6.8	7.0
Postpaid	51 %	31 %	24 %	20 %	23 %	24 %	25 %	26 %	32 %	33 %	35 %	38 %	43 %	47 %	49 %
Prepaid	49 %	69 %	76 %	80 %	77 %	76 %	75 %	74 %	68 %	66 %	65 %	62 %	57 %	53 %	51 %

■ Prepaid ■ Postpaid — Subscriptions
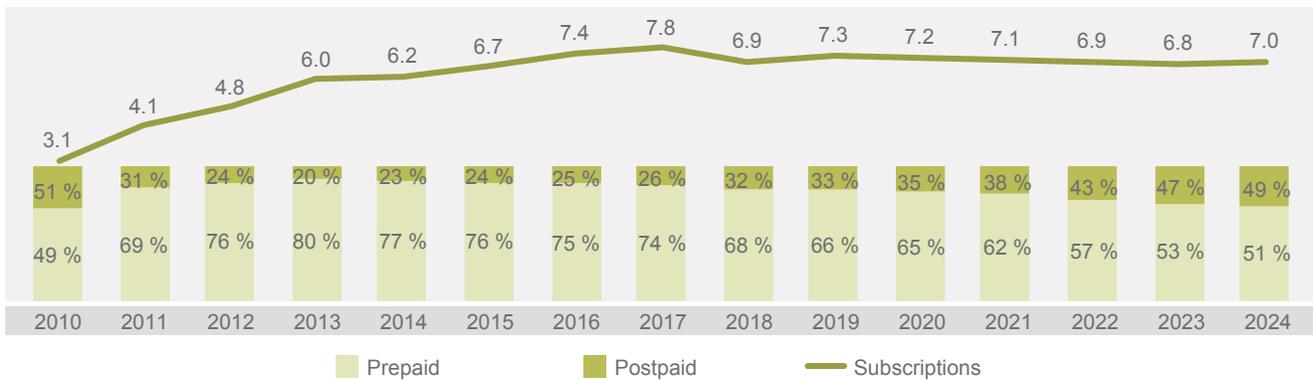
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 26. COSTA RICA: Total voice traffic and monthly traffic per subscription by payment method, mobile telephone service, 2011-2024

(figures in millions of minutes at the total level and minutes at the subscriber level)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Grand Total	6,707	7,945	8,791	9,037	8,252	7,632	6,834	6,299	6,066	5,911	5,275	4,525	3,947	3,398
Monthly traffic per postpaid subscriber	210	199	192	190	178	153	143	130	132	143	123	98	82	66
Monthly traffic per prepaid subscriber	102	118	104	101	80	63	48	50	39	29	24	21	19	15

■ Monthly traffic per postpaid subscriber ■ Monthly traffic per prepaid subscriber — Grand Total

Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 27. COSTA RICA: Total monthly messaging traffic (SMS and MMS) per subscription for mobile phone services, 2011-2024

(figures in millions of messages at the total level and messages at the subscriber level)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total	25,367	23,056	19,652	12,308	7,239	5,197	3,289	2,340	1,802	1,414	1,374	1,409	1,444	1,502
Subscription messaging	511	398	272	165	90	58	35	28	21	16	16	17	18	18

■ Subscription messaging — Total
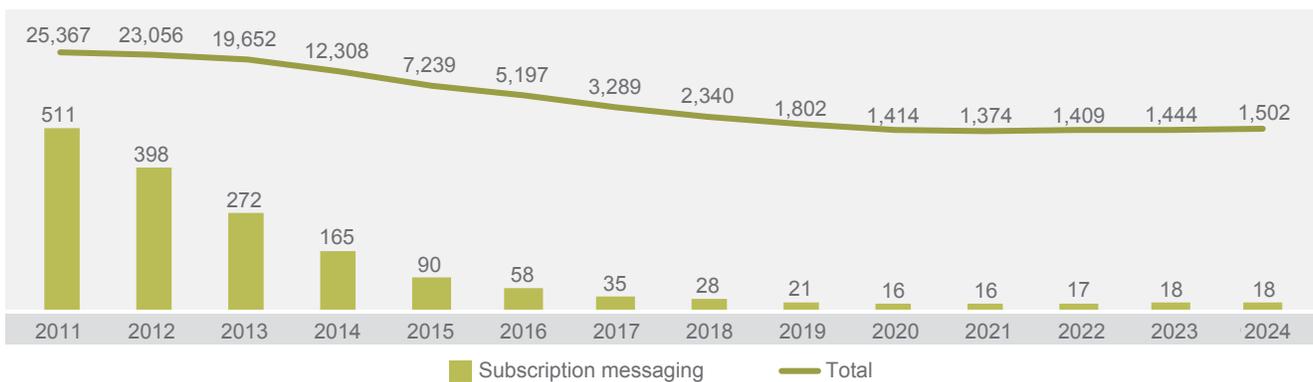
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 28. COSTA RICA: Mobile phone service voice revenue, 2011-2024

(figures in millions of colones at the total level, and in colones at the subscriber level)

Total line: 195,910 (2011), 234,567 (2012), 254,527 (2013), 301,041 (2014), 303,478 (2015), 289,358 (2016), 274,335 (2017), 247,645 (2018), 218,257 (2019), 198,835 (2020), 184,121 (2021), 175,526 (2022), 174,598 (2023), 176,342 (2024)

Subscriber: 3,948 (2011), 4,050 (2012), 3,524 (2013), 4,047 (2014), 3,790 (2015), 3,237 (2016), 2,939 (2017), 2,982 (2018), 2,517 (2019), 2,310 (2020), 2,154 (2021), 2,108 (2022), 2,134 (2023), 2,106 (2024)

Postpaid subscriber: 7,210 (2017), 6,280 (2018), 5,338 (2019), 4,915 (2020), 4,411 (2021), 4,017 (2022), 3,948 (2023), 3,802 (2024)

Prepaid subscriber: 1,416 (2017), 1,435 (2018), 1,099 (2019), 911 (2020), 780 (2021), 652 (2022), 545 (2023), 452 (2024)

Legend: Subscriber, Prepaid subscriber, Postpaid subscriber, Total

Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 29. COSTA RICA: Outbound voice and data roaming traffic, 2011-2024

(figures in millions of minutes and TB)

Voice (millions of minutes): 2.4 (2011), 4.4 (2012), 5.2 (2013), 5.5 (2014), 6.3 (2015), 7.4 (2016), 7.6 (2017), 9.8 (2018), 11.0 (2019), 4.1 (2020), 4.5 (2021), 5.4 (2022), 4.0 (2023), 5.7 (2024)

Data (TB): 2 (2013), 7 (2014), 12 (2015), 37 (2016), 81 (2017), 147 (2018), 304 (2019), 236 (2020), 518 (2021), 880 (2022), 1,419 (2023), 1,575 (2024)

Legend: Voice (millions of minutes), Data (TB)
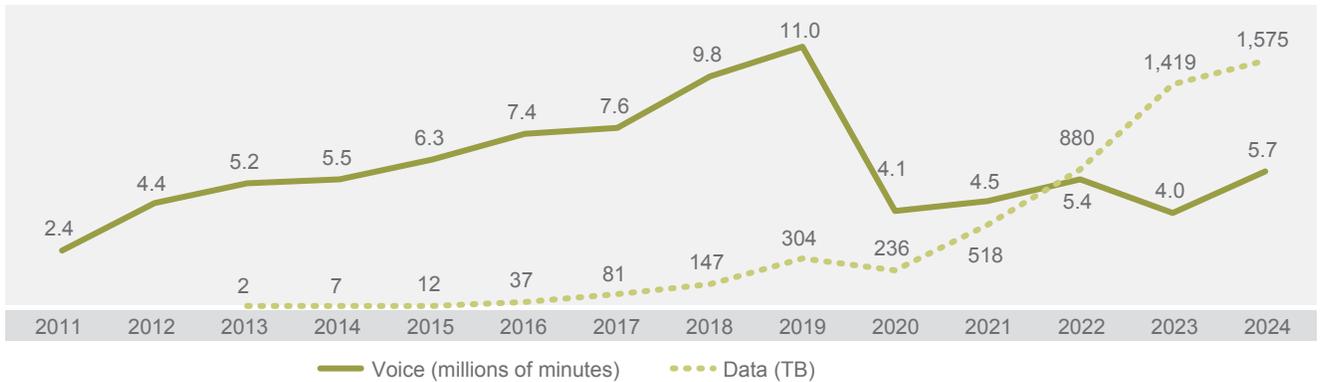
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 30. COSTA RICA: Outbound roaming revenue by component, 2011-2024

(figures in millions of colones and percentages)

Total roaming: 3,875 (2011), 3,235 (2012), 6,760 (2013), 6,182 (2014), 5,191 (2015), 5,453 (2016), 3,878 (2017), 3,326 (2018), 4,271 (2019), 1,281 (2020), 1,670 (2021), 2,831 (2022), 2,874 (2023), 2,596 (2024)

Voice entry: 100% (2011), 100% (2012), 47.5% (2013), 53% (2014), 59.4% (2015), 50.7% (2016), 61.5% (2017), 56.9% (2018), 43% (2019), 46.6% (2020), 30.5% (2021), 19.7% (2022), 16.7% (2023), 15.8% (2024)

Courier revenue: 4% (2013), 3% (2014), 2% (2015), 2% (2016), 2% (2017), 3% (2018), 8% (2019), 17% (2020), 14% (2021), 12% (2022), 9% (2023), 6% (2024)

Data entry: 48% (2013), 44% (2014), 38% (2015), 48% (2016), 36% (2017), 40% (2018), 49% (2019), 37% (2020), 56% (2021), 68% (2022), 75% (2023), 79% (2024)

Legend: Voice entry, Courier revenue, Data entry, Total roaming

Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 31. COSTA RICA: Total subscriptions and subscriptions by payment method for mobile Internet services, 2010-2024

(figures in millions of subscriptions and percentages)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total	0.6	1.6	2.7	3.5	3.8	4.2	4.3	4.8	5.1	4.6	4.7	4.9	5.0	5.2	5.3
Prepaid	58 %	78 %	79 %	77 %	71 %	68 %	65 %	64 %	56 %	48 %	45 %	44 %	42 %	41 %	39 %
Postpaid	42 %	22 %	18 %	22 %	28 %	30 %	33 %	34 %	42 %	49 %	52 %	53 %	55 %	56 %	59 %
Datacard	0 %	0 %	3 %	2 %	2 %	2 %	2 %	2 %	2 %	3 %	3 %	3 %	3 %	3 %	2 %

Legend: Datacard, Postpaid, Prepaid, Total subscriptions

Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 32. COSTA RICA: Total traffic and traffic per subscriber by mobile Internet service payment method, 2014-2024

(total figures in TB and per subscriber in GB per month)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total (TB)	42,721	59,003	83,216	137,226	142,518	160,565	222,810	269,157	332,661	416,442	477,399
Postpaid subscriber (GB)	1.98	2.62	4.18	5.36	4.44	5.19	6.89	7.53	8.58	10.54	11.26
Prepaid subscriber (GB)	0.59	0.63	0.39	0.74	0.61	0.63	0.71	1.06	1.66	1.62	2.14

Legend: Postpaid subscriber (GB), Prepaid subscriber (GB), Total (TB)
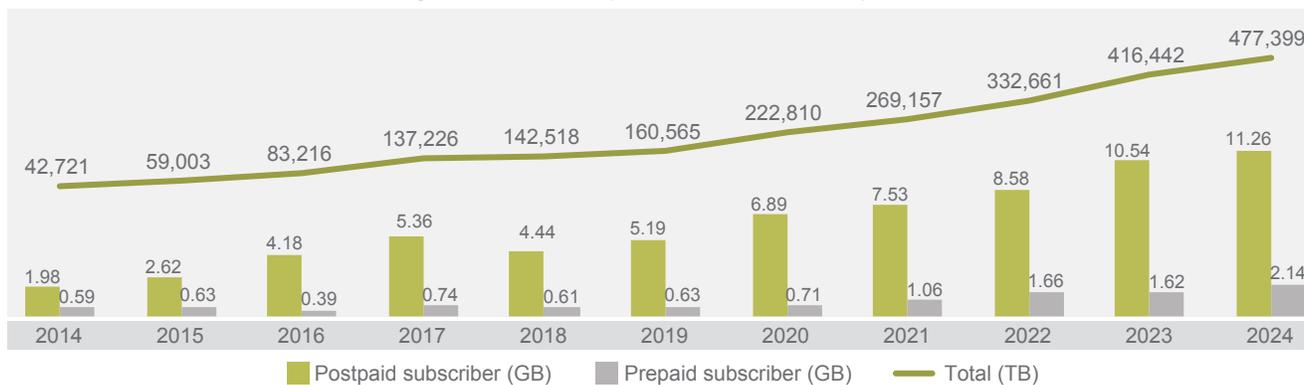
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 33. COSTA RICA: Total revenue and revenue per subscriber by payment method for mobile Internet service, 2011-2024

(total figures in millions of colones and per subscriber in colones)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total (millions)	24,221	36,499	94,006	127,198	170,422	194,505	207,668	235,538	265,485	255,358	254,740	261,815	279,377	307,494
Postpaid subscriber			4,552	4,853	5,159	5,105	5,099	5,604	6,778	6,527	6,268	6,108	6,307	6,706
Prepaid subscriber			1,532	1,875	2,556	2,923	2,730	2,480	2,656	2,026	1,855	1,952	1,896	1,902

Legend: Postpaid subscriber, Prepaid subscriber, Total (millions)

Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

DATA TRANSFER

Fixed Internet 2010-2024

Subscriptions

The evolution of fixed Internet service since 2010 is presented below. It should be noted that subscriptions have been collected since the fourth quarter of 2010, and in 2011, revenue registration began. Subsequently, in 2013, SUTEL started collecting data traffic by company. Furthermore, the breakdown by technology and speed has been obtained from subscriptions since 2010. However, in the breakdown by speed, the ranges have changed over time and for this study they have been standardized since 2014.

Graph No. 34 shows the series from 2010 to 2024 for fixed Internet subscriptions. In December 2010, there were 382,161 subscriptions, a figure that increased to 426,589 subscriptions in 2011 and continued to increase each year during the period.

The average annual variation calculated for the period is 8.5 %, with the largest increase in subscriptions occurring in 2017, when 107,954 more subscriptions were registered than in 2016. It is also noteworthy that from 2021 to 2022, from 2022 to 2023, and from 2023 to 2024, simple growth was less than 5 %.

Graph No. 35 shows the change in the number of subscriptions by technology between 2010 and 2024. Subscriptions to coaxial cable access networks will increase from 159,450 in 2010 to 477,174 at the end of 2024. A total of 218,537 copper subscriptions were recorded in 2010, a number that will fall to 34,693 in 2024. Fiber subscriptions will increase from 283 in December 2010 to 650,295 in 2024. Finally, wireless technology subscriptions will increase from 3,891 in 2010 to 32,476 by the end of 2024.

The breakdown by speed can be observed in Graph No. 36. A comparison is made between 2010 and 2024 for speed ranges below 2 Mbps, from 2 Mbps to 10 Mbps, and above 10 Mbps. In the first range, the total number of subscriptions will fall from 96.46 % in 2010 to 0.36 % in 2024. The 2 Mbps to 10 Mbps range accounted for 3.49 % in 2010 and 3.0 % in 2024, while the change in speeds greater than 10 Mbps is from 0.042 % in 2010 to 96.64 % in December 2024.

Graph No. 37 shows the behavior of fixed Internet service revenues between 2011 and 2024. In the first year of the period, 60,704 million colones were recorded, a value that increases to 216,614 million in 2024. The average annual growth for the period is 10.3 %. Graph No. 38 shows the change in annual revenues by technology, comparing 2014 with 2024 for reasons of simplicity and to maintain consistency with the presentation of revenues by speed. Cable modem networks will increase from 33,504 million to 63,463 million, copper from 44,790 million colones to 10,011 million, and fiber subscriptions will climb from 8,064 million colones to 132,660 million by the end of 2024. Meanwhile, the wireless technologies group will go from 2,989 million to 10,479 million. In 2010, there was an unspecified category that totaled 2,905 million colones, which no longer existed in 2024.

In terms of revenue by speed, Graph No. 39 shows that the range of speeds below 2 Mbps went from 41.14 % in 2014 to 0.88 % in 2024, the group of subscriptions with contracted speeds between 2 Mbps and 10 Mbps registered 32.89 % in 2014 and 4.85 % in 2024; at speeds greater than 10 Mbps, it increased from 9.55 % in 2014 to 94.27 % in 2024. The "unspecified" category represented 16.42 % in 2014 and no longer existed in 2024.

We conclude with Graph No. 40, which shows the 2013-2024 series for fixed Internet service data traffic in TB. An average annual growth of 45.5 % is estimated for the period. Using simple growth compared to the previous year, it can also be seen that the year with the highest growth was 2020, with 94 % more traffic than in 2019. In absolute terms, the largest increase was from 2019 to 2020, with 1,087,840 TB.

Dedicated lines

Below are two graphs that analyze the behavior of the dedicated line market in Costa Rica. Graph No. 41 details the evolution of the number of dedicated line connections, allowing us to observe the growth and fluctuations in demand for these services over the years. The second graph focuses on total revenue and the monthly evolution of average revenue per user (ARPU), providing a comprehensive view of the market's profitability.

Connections

Graph No. 41 shows the evolution of the number of dedicated line connections in Costa Rica between 2010 and 2024. There was a sustained increase in the number of connections from 2010 to 2019, with a notable increase between 2012 and 2013, reaching 17,968 connections in 2013, followed by a slight decrease in 2014. However, since 2015, the number of connections has remained relatively stable, with moderate growth in the last two years of the period.

The highest peak of growth occurred in 2019, representing a point of high expansion with a total of 22,921 connections, reflecting strong market demand during that period.

Meanwhile, following the economic effects of 2020, stability and recovery are maintained through 2024, with 20,089 connections registered, a significant figure that continues the pattern of stability observed in previous years, with growth compared to 2023 of 19,454 connections.

Revenue

Graph No. 42 shows the evolution of total revenue and monthly revenue per user (ARPU) in Costa Rica between 2011 and 2024. To calculate ARPU, the number of dedicated line connections registered each year was used, providing a representative metric of the average revenue per user, i.e., the average amount each operator pays per month for the use of dedicated lines.

Since 2011, revenues have fluctuated, reflecting both periods of growth and contraction. This dynamic responds to factors such as service demand and customer composition, as this market combines users with permanent contracts and others who require the service on an occasional basis. In 2024, total revenue reached 42,623 million colones, representing a 4.5 % increase over the 40,780 million colones recorded in 2023, indicating a sustained recovery over the last year.

In addition, it can be observed that, since 2010, ARPU has fluctuated due to market changes, technological advances, and the diversification of connectivity. It peaked in 2013 at 251,000 colones per month, followed by a downward trend until 2020, when it recorded its lowest value (177,000 colones). From 2021 onwards, it showed a gradual recovery, reaching 177,000 colones in 2024. This evolution suggests that there is stability in the demand for dedicated lines, which is key to the sustainability of this service and to the projection of future revenues.

GRAPH 34. COSTA RICA: Fixed Internet subscriptions at year-end, 2010-2024

(annual figures)
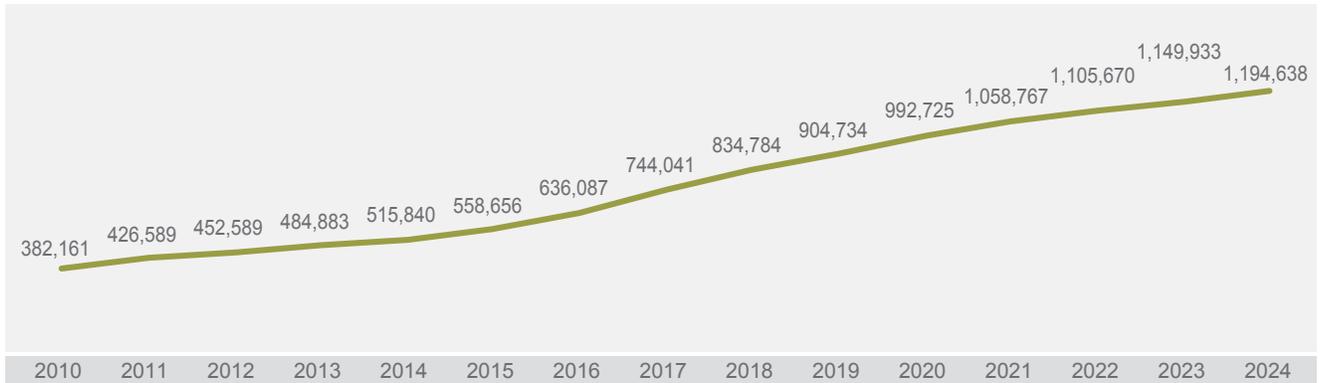
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 35. COSTA RICA: Fixed Internet subscriptions at year-end, by technology, 2010-2024

(annual figures)
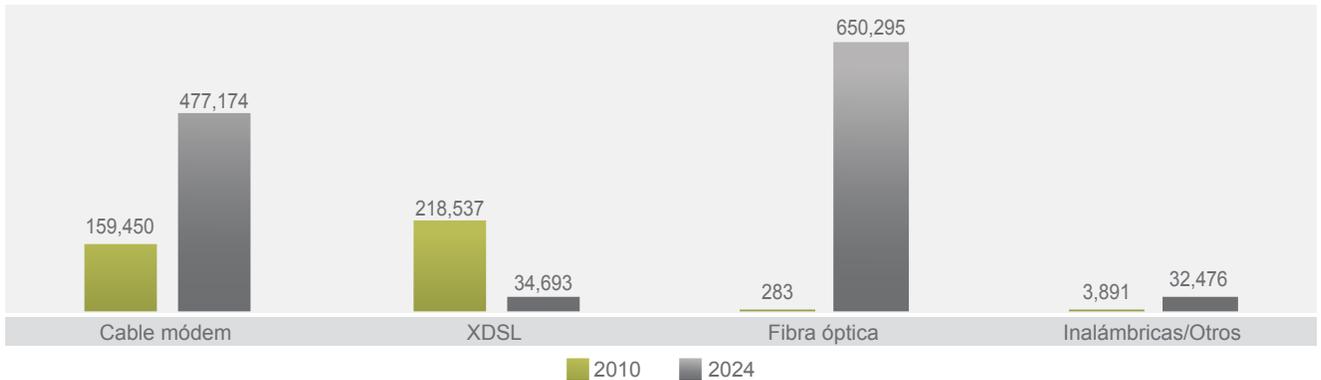
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 36. COSTA RICA: Fixed Internet subscriptions at year-end, by contracted speed range, 2010 and 2024

(figures in percentage terms)
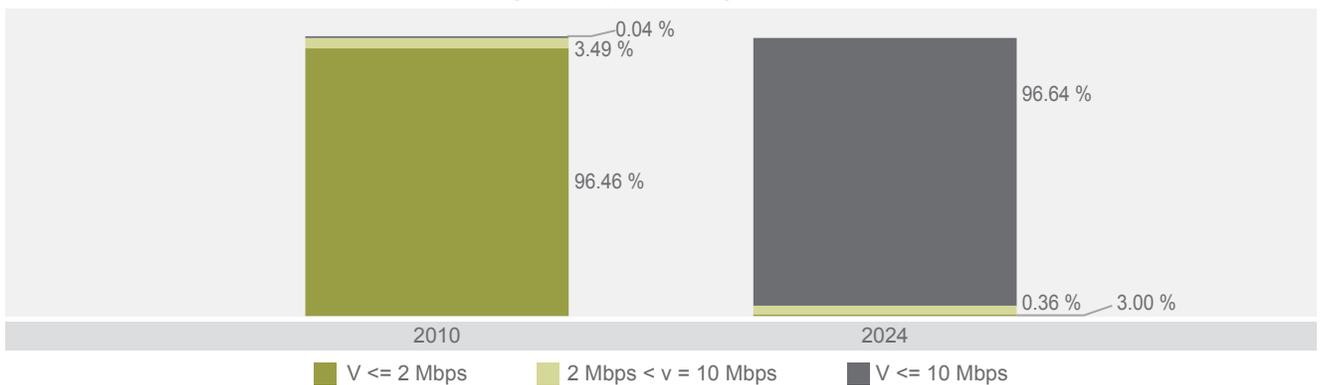
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 37. COSTA RICA: Fixed Internet revenue, per year, 2011-2024
(annual figures)

Year	Value
2011	60,704
2012	67,665
2013	68,473
2014	92,252
2015	96,970
2016	110,708
2017	127,472
2018	147,524
2019	160,518
2020	170,879
2021	192,484
2022	206,476
2023	201,991
2024	216,614
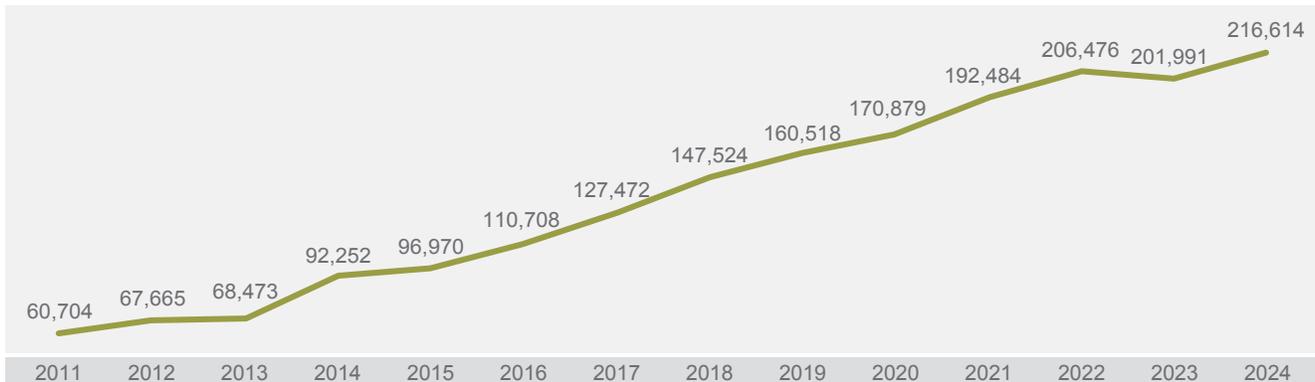
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 38. COSTA RICA: Fixed Internet revenue at year-end, by technology, 2014-2024
(figures in millions of colones)

Technology	2014	2024
Cable módem	33,504	63,463
XDSL	44,790	10,011
Fibra óptica	8,064	132,660
Inalámbricas/Otros	2,989	10,479
Sin desglosar		2905
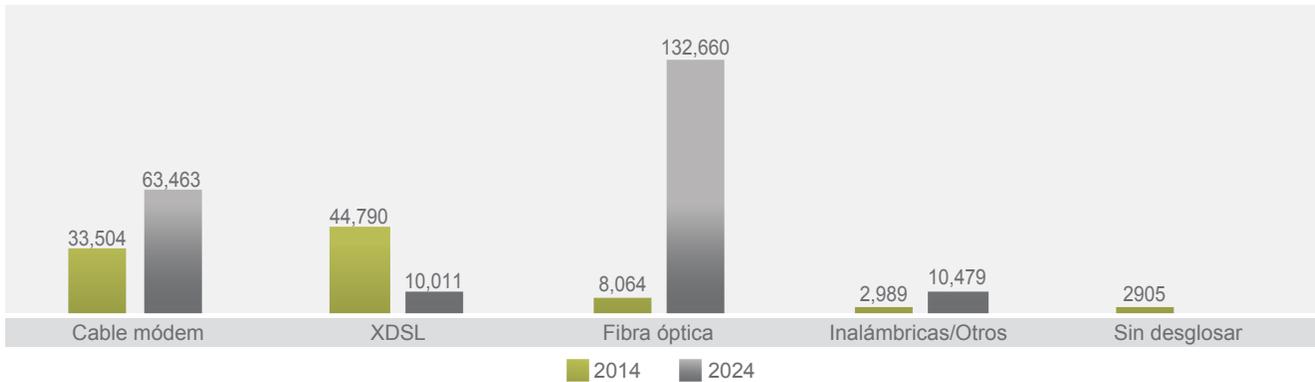
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 39. COSTA RICA: Fixed Internet revenue at year-end, by contracted speed range, 2014 and 2024
(figures in millions of colones)

Speed range	2014	2024
V <= 2 Mbps	41.14 %	4.85 %
2 Mbps < v = 10 Mbps	32.89 %	0.88 %
V <= 10 Mbps	9.55 %	94.27 %
Unspecified	16.42 %	
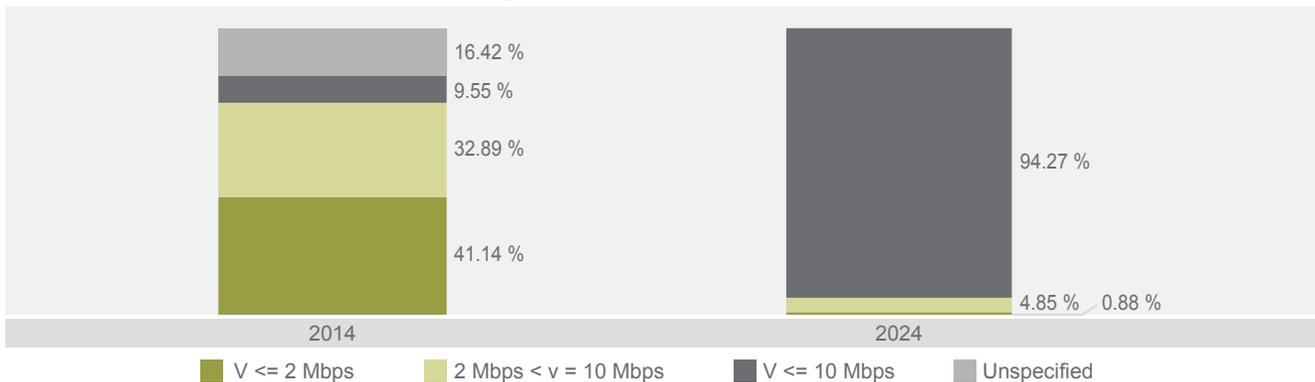
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 40. COSTA RICA: Fixed Internet traffic, per year, 2013-2024
(figures in TB)

Year	Value
2013	96,951
2014	138,545
2015	270,967
2016	387,430
2017	620,172
2018	865,777
2019	1,162,046
2020	2,249,887
2021	3,069,352
2022	3,728,233
2023	4,599,796
2024	6,004,558
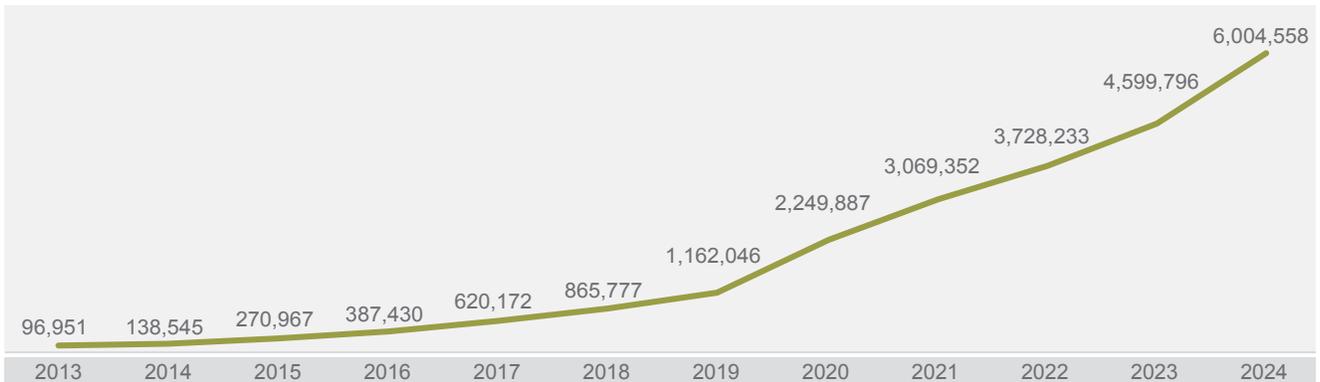
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 41. COSTA RICA: Total connections, dedicated lines, 2010-2024
(annual figures)

Year	Value
2010	8,326
2011	10,218
2012	11,847
2013	17,968
2014	16,166
2015	16,155
2016	16,142
2017	18,305
2018	19,167
2019	22,921
2020	23,665
2021	18,625
2022	18,140
2023	19,454
2024	20,089
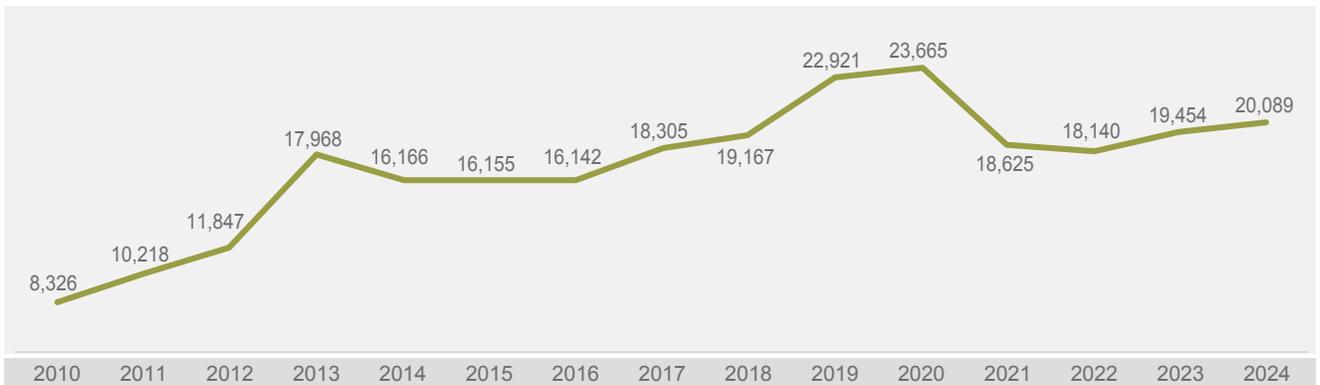
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 42. COSTA RICA: Total revenue and monthly revenue per user, dedicated lines, 2011-2024
(figures in millions at the total level and thousands at the user level)

Year	Income	Monthly ARPU
2011	24,877	203
2012	35,260	248
2013	50,947	236
2014	48,611	251
2015	40,565	209
2016	40,572	209
2017	45,864	209
2018	44,457	193
2019	49,675	181
2020	50,216	177
2021	53,901	241
2022	46,043	212
2023	40,780	175
2024	42,623	177

■ Monthly ARPU —— Income
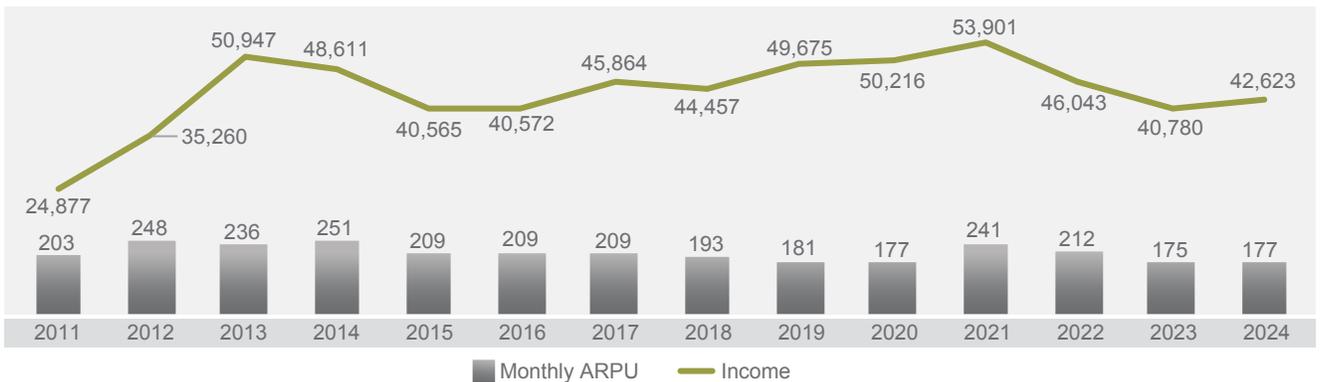
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

FIXED TELEPHONE SERVICE

Fixed telephone service is a service that has been commercially available since well before 2010. However, it was not until the third quarter of that year that the Superintendency of Telecommunications began to compile official statistics for this service, initially covering plain old telephone service and public telephony. Subsequently, with the rollout of Internet networks, a series of services and applications have been developed, including service via Internet protocol or VoIP, which has gained acceptance in the market. It can be concluded that the statistics demonstrate the dynamism that has been sustained by the emergence of new providers and the increase in the variety of services offered in accordance with current regulations in the country.

In terms of total subscriptions to this service, there were 1,060,386 subscriptions in December 2010 and 608,667 subscriptions in the same period in 2024, This represents 451,719 fewer subscriptions, with a compound annual decline of 3.86 % and an average annual rate of -3.4 % (see Graph No. 43).

On the other hand, total service traffic will increase from 544.3 million accumulated minutes at the end of 2011 to 643.2 million minutes at the end of 2024. This is effectively demonstrated by the reduction of 4,798 million minutes, which implies a compound annual decrease of 14.15 % (see Graph No. 44).

In relation to the traffic analysis for this service, the estimated average traffic per subscriber is also evident. For plain old telephone service, in 2011 the average annual traffic per subscriber reached 5,288 minutes, while in 2024 this annual average will fall to 632 minutes, which is equivalent to a compound annual decrease of 14.8 % for the period. As for VoIP service, the average annual traffic per user will increase from 1,447 minutes in 2011 to 1,532 minutes in 2024, with a compound annual growth rate of 0.4 % (see Graph No. 45).

In terms of revenue generated by the provision of fixed telephony services, and in line with both subscription trends and traffic associated with this service, revenue generated by fixed telephony generally shows a downward trend between 2011 and 2024. This represents a decrease from 88,614 million colones to 31,397 million colones, respectively, with a difference in absolute terms of 57,214 million colones and 7.1 % in relative terms (see Graph No. 46).

Similarly, by comparing revenue and the number of subscribers to the service, it is possible to estimate the average revenue generated by each user for these operators (ARPU). In this regard, the average revenue per subscriber for 2011 is 85,988 for plain old telephone service and 59,592 for VoIP. On the other hand, for 2024, it is 52,502 for plain old telephone service and 50,555 for VoIP (see Graph No. 47).

GRAPH 43. COSTA RICA: Fixed telephony subscriptions (plain old telephone service & VoIP), 2010-2024

(annual figures in thousands of subscriptions and percentage)

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total fixed telephony	1060.4	1031.6	995.0	968.5	881.2	850.4	833.6	808.8	764.1	636.5	556.6	500.6	488.6	629.7	608.7
VoIP			2 %	3 %	5 %	5 %	6 %	8 %	9 %	10 %	9 %	11 %	16 %	43 %	47 %
Traditional basic telephony	100 %	100 %	98 %	97 %	95 %	95 %	94 %	92 %	91 %	90 %	91 %	89 %	84 %	57 %	53 %

Traditional basic telephony ■ VoIP ━ Total fixed telephony
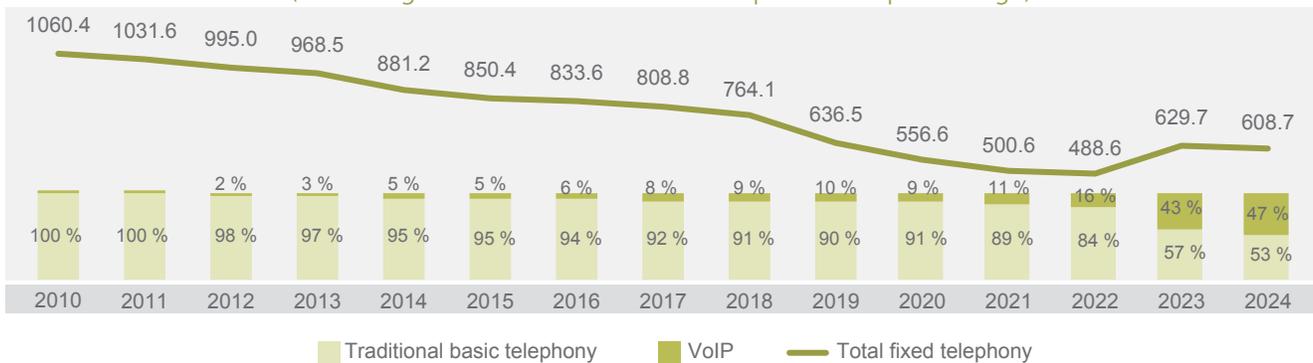
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 44. COSTA RICA: Total fixed telephony traffic, 2011-2024
(cumulative figures per year in millions of minutes)

Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
	5,441.3	4,908.5	4,137.9	3,472.3	3,209.7	2,965.8	2,683.2	2,402.4	1,870.5	1,646.9	1,353.5	1,089.4	804.9	643.2
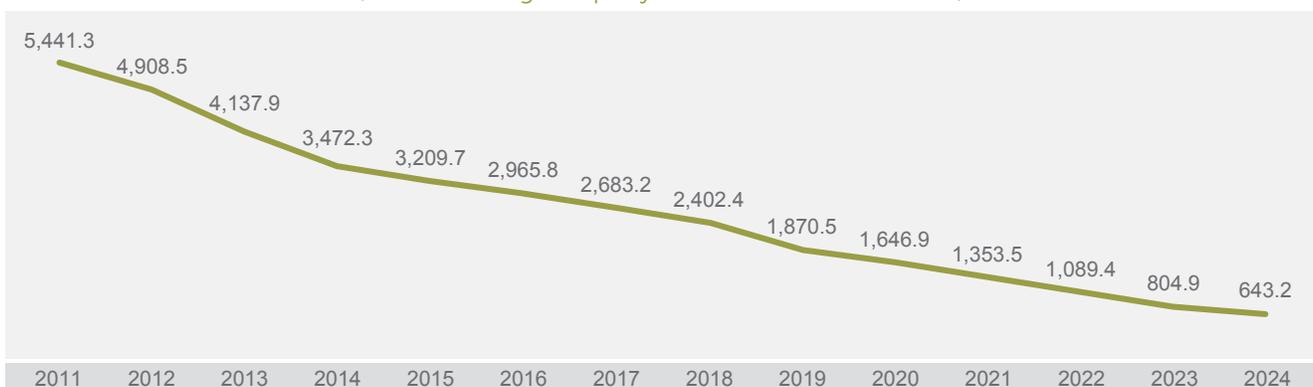
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 45. COSTA RICA: Average traffic per fixed telephony subscriber by type of connection (i.e.: plain old telephone service & VoIP), 2011-2024
(figures in minutes)

Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Basic Trad.	5,288	4,985	4,338	4,253	3,701	3,371	3,063	2,886	2,849	2,902	2,651	2,170	1,563	632
VoIP	1,447	2,162	2,398	3,925	5,059	6,272	6,396	5,832	3,730	3,501	3,117	2,531	893	1,532

━ Basic Trad. ▪▪▪ VoIP

Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 46. COSTA RICA: Revenue from fixed telephony services, 2011-2024
(figures in millions of colones)
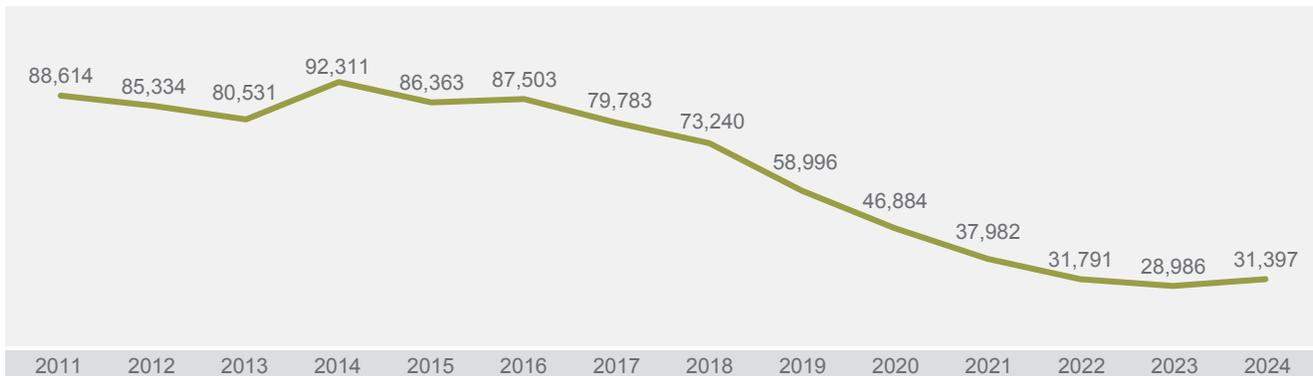
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 47. COSTA RICA: Average revenue per fixed telephony subscriber by type of connection (i.e.: plain old telephone service & VoIP), 2011-2024
(annual figures in thousands of colones)
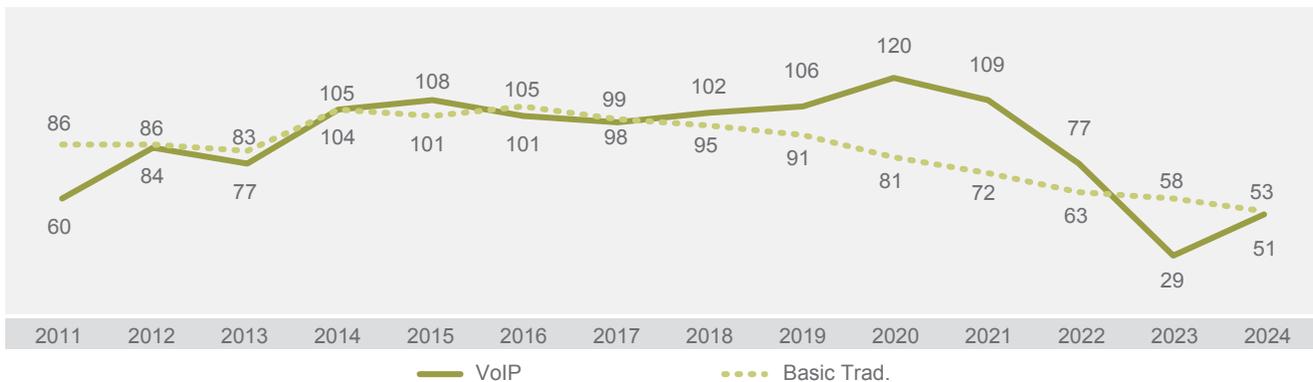
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

PAY TELEVISION SERVICE

As of December 2024, pay television service is marketed by a total of 26 operators or providers. However, since the fourth quarter of 2010, when SUTEL began collecting statistics for this service, there have been additions, disappearances, and transformations, making the service more dynamic both commercially and technologically.

In terms of total subscriptions to this service, there were 451,414 in December 2010 and 798,828 in the same period in 2024, This represents 347,414 additional subscriptions, with a compound annual growth rate of 4.16 % and an average annual rate of 4.4 % (see Graph No. 48).

The revenue generated from the provision of this service consequently shows a similar trend, considering that the accumulated revenue during 2011 amounted to 70,435 million colones and by 2024 reached 156,093 million colones, which means an increase of 85,658 million colones, with a compound annual growth rate of 5.85 % and an average annual rate of 6.7 % (see Graph No. 49).

The average monthly revenue per subscriber for this service during the period 2011–2024 will increase from 13,763 colones in 2011 to 16,284 colones in 2024 (see Graph No. 50).

GRAPH 48. COSTA RICA: Total subscriptions to pay TV services, 2010 – 2024

(figures in thousands at the end of each year)

451.4 498.1 540.7 641.0 732.5 797.2 821.6 831.9 883.9 874.1 866.6 849.0 831.6 819.1 798.8

2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024

Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 49. COSTA RICA: Total revenue from pay TV services, 2011 – 2024

(annual aggregate figures in millions of colones)

70,435 90,055 103,802 124,446 134,850 140,531 148,507 155,126 160,768 164,032 164,722 162,371 166,879 156,093

2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024
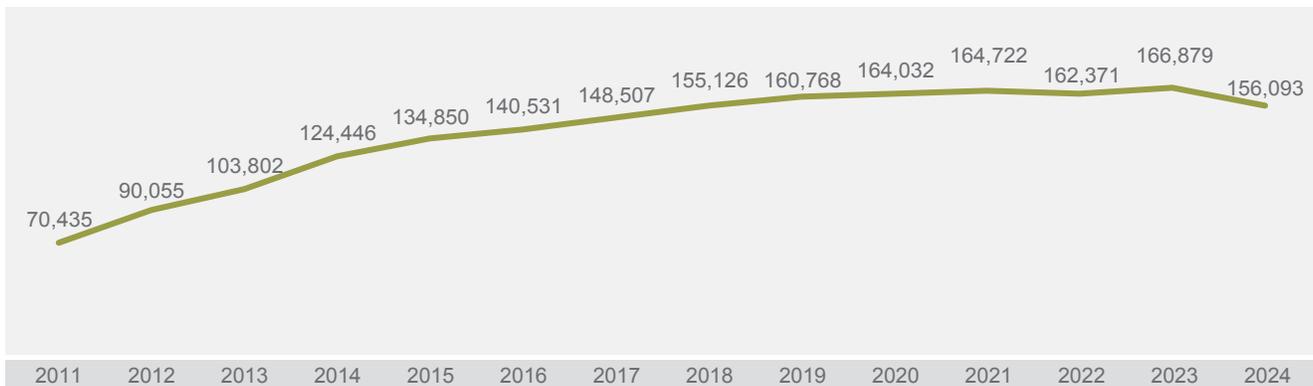
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 50. COSTA RICA: Average monthly revenue per subscriber from pay TV subscriptions, 2011 – 2024

(monthly figures based on quarterly data in colones per subscriber)

13,763 13,880 13,494 14,157 14,096 14,254 14,876 14,625 15,327 15,774 16,169 16,271 16,979 16,284

2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024
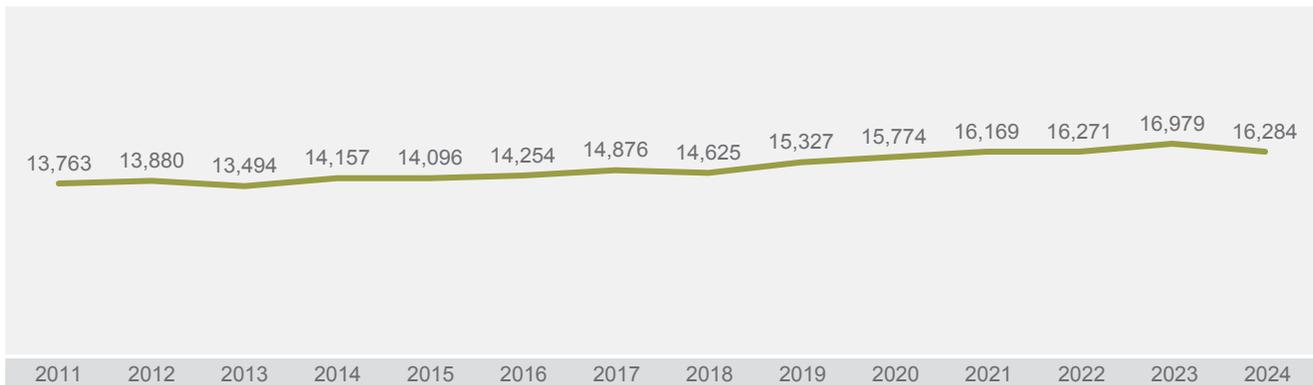
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

Fixed
telephony

FIXED TELEPHONY

Subscriptions

In 2024, the fixed telephone service will show two particular characteristics in its behavior compared to what has been observed in recent years. The first refers to the number of subscriptions to the fixed telephone service (basic traditional and VoIP), which will increase from 556,617 in 2020 to 608,667 at the end of 2024 (9.35 %). This variation takes into account the actual increase of 187,048 subscriptions, equivalent to an annual increase of 38 % during the fourth quarter of 2023, marking the first change in trend since the opening of the telecommunications market in Costa Rica (see Graph No. 51).

This particularity, brought about by an improvement in the information requirements for measurement, as well as in the reporting of these indicators for voice over Internet protocol (VoIP) services by the Costa Rican Institute of Electricity, both in terms of subscriptions and traffic and revenue, By 2024, the variation in the trend will be left behind, and by December of that year, there will be a decrease of 21,021 (3.34 %) compared to 2023.

In this regard, Graph No. 52 shows the combined performance of plain old telephone service and VoIP subscriptions for the last five years, reflecting the second peculiarity for the end of 2024 compared to 2023. Despite the increase of 19,537 VoIP subscriptions (7 %), in the case of plain old telephone service subscriptions, the situation is different, as they fell to 321,465, which means 40,558 (11 %) fewer subscriptions than in 2023.

In terms of the percentage distribution of the service for these technologies, the disproportionate ratio is reduced due to the increase in VoIP subscriptions for 2023. Thus, this ratio changes from 9.4 % for VoIP and 90.6 % for plain old telephone service in 2020 to 47.2 % and 52.8 % in 2024, respectively (see Graph No. 53).

When considering the number of quarterly subscriptions to fixed telephony services during 2023 and 2024, there is a general decline in total service subscriptions. This situation has been mainly driven by the reduction in plain old telephone service subscriptions, coupled with the performance of VoIP service subscriptions in the last quarter of 2023. In addition, an average quarterly growth rate of 3.37 % was recorded during these two years (see Table No. 34 in the Annex).

Conversely, when analyzing the existing level of market concentration in terms of the provision of fixed telephony services, which include POTS and VoIP, ICE's position as incumbent operator must be emphasized and reiterated, given the provision of this service through the former of these technologies. In this regard, the Herfindahl-Hirschman Index (HHI) for 2024 stands at 6,360 points, lower than the 7,062 points recorded in 2023, but does not differ significantly from the calculation (8,771 points) included in Resolution RCS-261-2016 of November 23, 2016, related to the first review of the retail fixed telephone service market. This measurement keeps this market highly concentrated.

As noted in the aforementioned resolution RCS-261-2016, the IHH as a structural indicator shows that the entry of new competitors into the Costa Rican fixed voice communications market has had a slight impact on the recomposition of market shares, driven specifically by the dynamism in the behavior of VoIP telephony.

"By 2024, subscriptions to plain old telephone service declined by 11% compared to 2023"

With regard to the penetration of plain old telephone service in the country, measured as the percentage of total subscriptions relative to the total population, there is a downward trend, from 11.3 % in 2020 to 6.9 % in 2024 (see Graph No. 54). On the other hand, the penetration of voice over Internet protocol (VoIP) service is expected to increase significantly by 2024, from 1.0 in 2020 to 5.6 subscriptions per 100 inhabitants (see Graph No. 55). The penetration of fixed telephony services in general also shows this trend, mainly due to the performance of the plain old telephone service, as shown in Graph No. 56, where the percentage of subscriptions per 100 inhabitants is expected to rise from 10.9 in 2020 to 11.8 in 2024.

In relation to market share and distribution by VoIP service operators, as well as their evolution over the last two years, Graph No. 57 and 58 show the Costa Rican Institute of Electricity (Kölbi) with the largest share of this type of service for 2024 (53.5 %), making it the leader for both years, followed by Liberty Servicios Fijos LY Sociedad Anónima (Liberty), Millicom Cable Costa Rica S.A. (TIGO) and Telecable, S.A. (Telecable), with these four remaining the main operators in this service category.

Considering that fixed telephony services include public payphones, it is important to analyze the number of public payphones, and how their availability has changed, during the five-year period in question. Graph No. 59 shows a decrease in the number of public payphones, which fell from 3265 payphones in 2020 to 1790 payphones in 2024. This confirms the continuing downward trend shown since 2013, as stated in previous reports, given that the results show a decrease of 27 % in 2024 in relation to 2023, and a decrease of 45 % in relation to 2020.

Traffic

Total telephone traffic carried over fixed networks continues to decline. While 1.647 billion minutes were transferred in 2020, by 2024 this traffic had fallen to 643 million minutes, equivalent to an average annual reduction of 19.1 %. Likewise, considering only the last year, the observed reduction (162 million minutes) represents a decrease of 25.1 % (see Graph No. 60).

On the other hand, with regard to VoIP telephone service, the corresponding telephone traffic maintained steady growth, taking into account the traffic generated by new subscriptions in the fourth quarter of 2023. As such, VoIP minutes increased from 183 million minutes in 2020 to 440 million minutes in 2024. An analysis of the growth rate over the last year, however, shows an increase of 201 million minutes by year's end, which represents an increase of 84.2 % in relation to 2023 (see Graph No. 61).

In regard to the percentage share of telephone traffic reported by operators engaged in the provision of VoIP services, five operators accounted for 79.6 % of the total traffic in 2023, to wit (in alphabetical order): Call My Way S.A. (Call My Way), Instituto Costarricense de Electricidad (Kölbi), Liberty Servicios Fijos LY Sociedad Anónima (Liberty), Millicom Cable Costa Rica S. A. (TIGO), and Telecable, S. A. (Telecable).

By 2024, this same number of operators will account for 90.6 % of the total, with the following companies standing out in the same order: Call My Way S.A. (Call My Way), Claro CR Telecomunicaciones, S. A. (Claro), Instituto Costarricense de Electricidad (Kölbi), Millicom Cable Costa Rica S. A. (TIGO), and Telecable, S. A. (Telecable). This increase in the operators' percentage share is attributable to Kölbi's records and its percentage share of the total traffic for this service (see Graphs No. 62 and 63).

As for the performance of outgoing national fixed telephony traffic to fixed and mobile networks from 2020 to 2024, the downward trend continues, with 3,419 thousand fewer minutes (54.5 %). Outbound traffic to fixed networks, however, shows significant fluctuations, but with an overall downward trend in the last five years. This was particularly evident at the end of 2024, with 529,602 minutes, representing a decrease of 99,127 minutes (15.8 %) compared to 2023 (see Graph No. 64).

On the other hand, total inbound fixed telephony traffic showed an average annual reduction of 13.3 % from 2020 to 2024. In particular, traffic fell from 9,108 million minutes in 2023 to 6,043 million minutes in 2024, reflecting a decrease of 33.8 % (see Graph No. 65).

With regard to international fixed telephony traffic, for the period 2020–2024, both incoming and outgoing traffic showed a downward trend, falling from 676,407 minutes and 224,345 minutes to 366,665 minutes and 155,081 minutes, respectively, which represents a reduction of 48.8 % in incoming traffic and 30.9 % in outgoing traffic. Compared to the previous year, total traffic fell from 591,096 minutes in 2023 to 521,747 minutes (11.7 %) in 2024 (see Graph No. 66).

Finally, an estimate of the average traffic per subscriber is obtained from the service's traffic analysis. Plain old telephone service subscribers averaged 2,902 minutes of traffic in 2020, falling to 632 minutes in 2024, which represents an annual reduction of 78.2 % for the period. As for VoIP service, average annual traffic per user has decreased from 3,501 minutes in 2020 to 1,532 minutes in 2024, representing a decline of 56.2 % (see Graph No. 67).

Revenue

Revenue generated by fixed telephony services as a whole are in line with subscription trends and associated traffic. Overall, total revenue is expected to decline between 2020 and 2023. However, in 2024, they will increase by 31,397 million colones (8.3 %) (see Graph No. 68).

In the case of VoIP services, this technology shows a different trend from plain old telephone service. Specifically, revenue increases over time, from 6,261 million colones in 2020 to 14,519 million colones in 2024 (131.9 %). In this regard, the most significant increase occurred in the last year, with 6,631 million colones more than in 2023, equivalent to an increase of 84.1 % (see Graph No. 69).

In regard to the revenue from international fixed telephony traffic in 2020-2024, inbound and outbound traffic shows a downward trend. Corroborating the above, revenue from inbound traffic fell from 401 million colones to 126 million colones, which represents a decrease of 69 % over the five-year period under analysis. Similarly, revenue from outbound traffic fell from 1,139 million colones to 316 million colones from 2020 to 2024, which represents a decrease of 72 %. In particular, over the last year, revenue from inbound traffic decreased by 30 %, while the revenue from outbound traffic decreased by 26 % (see Graph No. 70).

In the same manner, the average revenue per user [ARPU] is estimated by comparing the revenue to the number of subscribers. The average revenue per user, in 2024, was 58,277 for plain old telephone services, and 50,555 for VoIP services, which represents a decrease of -9.9 % and -71.4 %, respectively, in relation to 2023 (see Graph No. 71 and Table No. 44 in the Appendix).

In this regard, Graph No. 72 shows the results of the estimate of average revenue per minute for both technologies. From 2020 to 2024, the average revenue per minute for plain old telephone services showed an upward trend, rising from 28 colones to 83 colones per minute, as did the average revenue per minute for VoIP services, which increased from 28 colones to 33 colones per minute at the end of 2024. Moreover, as of January 2024, the Board of Directors of SUTEL agreed25 to set a new cap or maximum rate for the fixed telephony retail market (POTS & VoIP).

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25   Resolution RCS-330-2022 published in scope 7 of the Official Gazette "*La Gaceta*" No. 8 on January 18th, 2023.

GRAPH 51. COSTA RICA: Plain old telephone service [POTS] & VoIP telephony Subscriptions in 2020-2024

(yearly figures)

556,617   500,550   488,582   629,688   608,667

| 2020 | 2021 | 2022 | 2023 | 2024 |
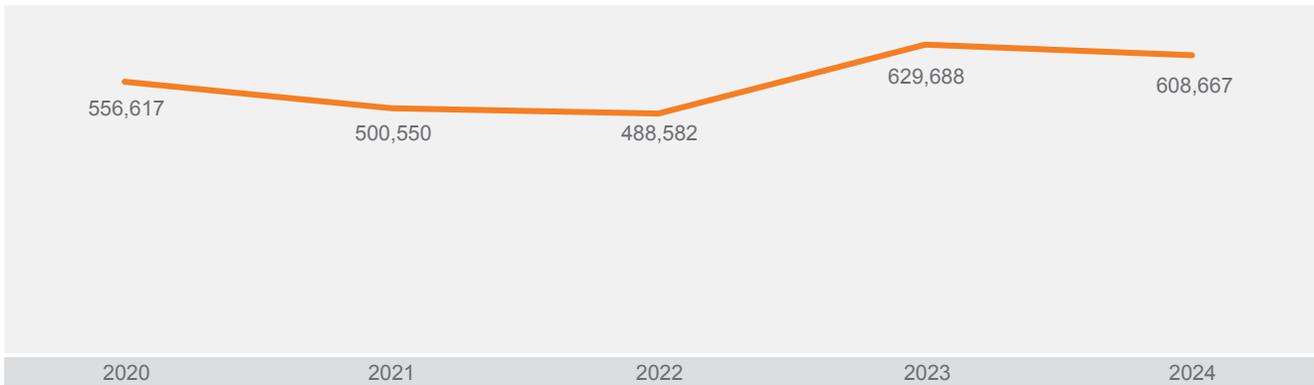
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 52. COSTA RICA: Plain old telephone service [POTS] & VoIP telephony Subscriptions in 2020-2024

(yearly figures)

504,276   443,684   410,454   362,023   321,465

267,665   287,202

52,341   56,866   78,128

| 2020 | 2021 | 2022 | 2023 | 2024 |

———— Traditional Basic Telephony   ----- VoIP
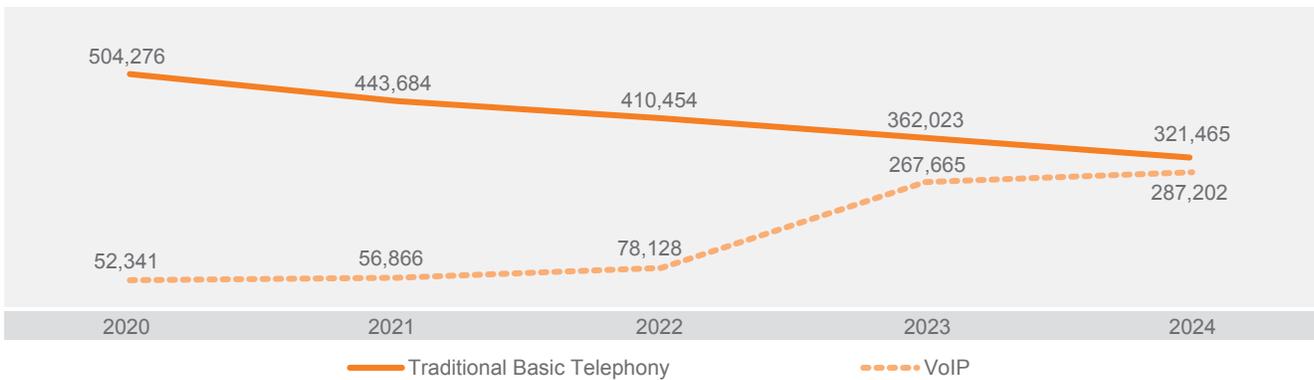
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 53. COSTA RICA: Percentage of Plain Old Telephone Service [POTS] & VoIP telephony subscriptions in 2020-2024

(yearly figures)

2020	2021	2022	2023	2024
9.4 %	11.4 %	16.0 %	42.5 %	47.2 %
90.6 %	88.6 %	84.0 %	57.5 %	52.8 %

■ Traditional Basic Telephony   ■ VoIP
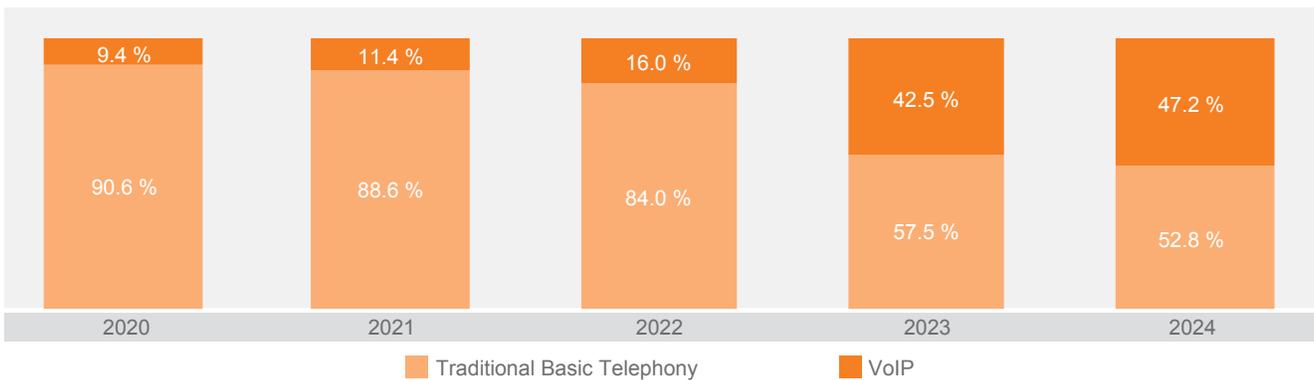
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 54. COSTA RICA: Market penetration of Plain Old Telephone Service [POTS] in 2020 - 2024
(subscriptions per 100 inhabitants)

9.9
8.6
7.9
6.9
6.2

| 2020 | 2021 | 2022 | 2023 | 2024 |
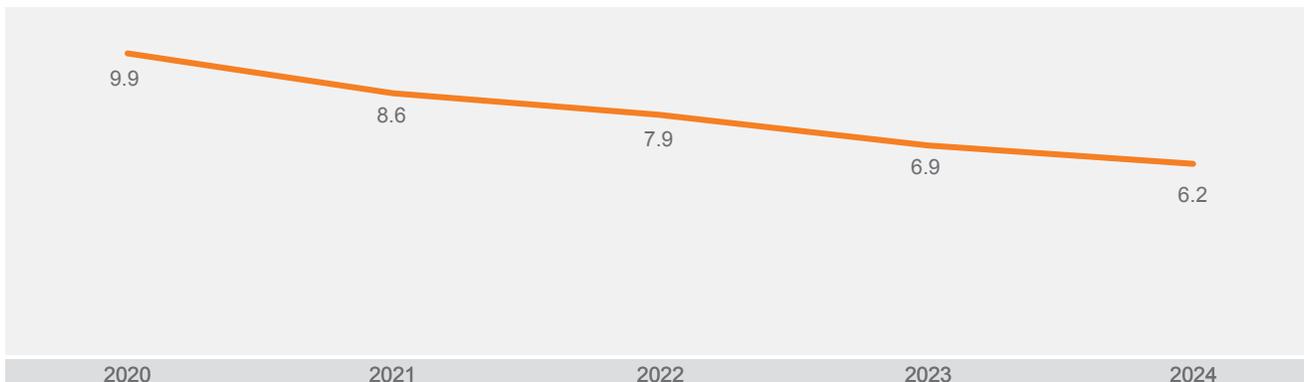
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 55. COSTA RICA: Market penetration of VoIP telephony services in 2020-2024
(subscriptions per 100 inhabitants)

5.1
5.6
1.0
1.1
1.5

| 2020 | 2021 | 2022 | 2023 | 2024 |
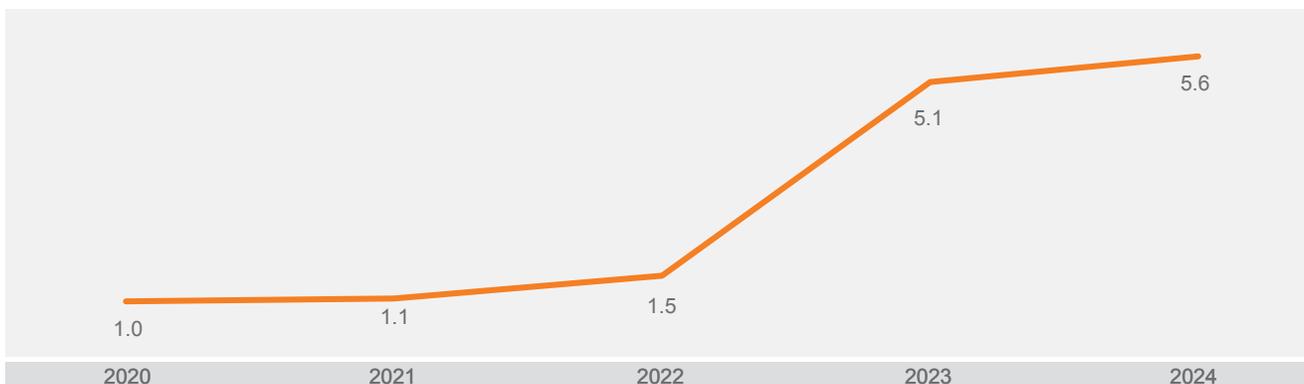
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 56. COSTA RICA: Market penetration of fixed telephony services in 2020-2024
(subscriptions per 100 inhabitants)

10.9
9.7
9.4
12.0
11.8

| 2020 | 2021 | 2022 | 2023 | 2024 |
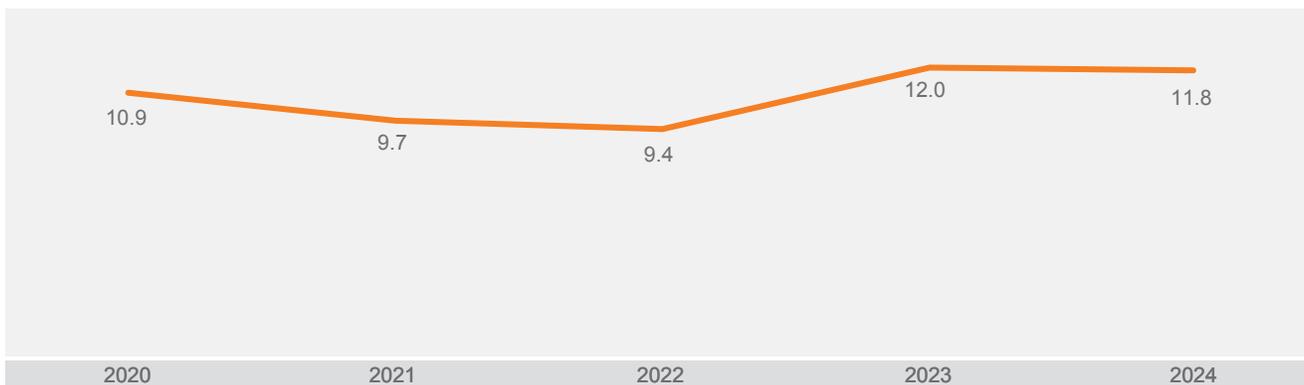
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 57. COSTA RICA: Market share of VoIP subscribers per operator in December 2023
(figures in percentage terms)

- 2.7 %
- 3.3 %
- 6.2 %
- 27.3 %
- 60.5 %

Legend:
- ● Instituto Costarricense de Electricidad (Kölbi)
- ● Liberty Servicios Fijos LY Sociedad Anónima (Liberty)
- ● Millicom Cable Costa Rica S. A. (TIGO)
- ● Telecable S.A. (Telecable)
- ● Others
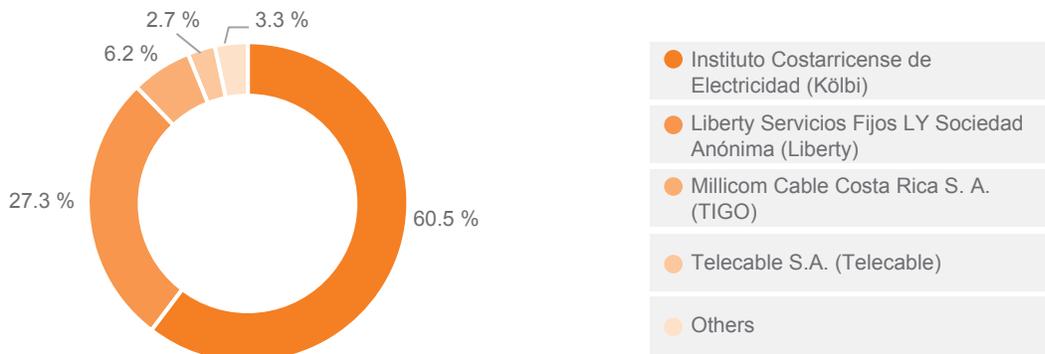
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 58. COSTA RICA: Market share of VoIP subscribers per operator in December 2024
(figures in percentage terms)

- 2.8 %
- 3.0 %
- 7.1 %
- 33.6 %
- 53.5 %

Legend:
- ● Instituto Costarricense de Electricidad (Kölbi)
- ● Liberty Servicios Fijos LY Sociedad Anónima (Liberty)
- ● Millicom Cable Costa Rica S. A. (TIGO)
- ● Telecable S.A. (Telecable)
- ● Others
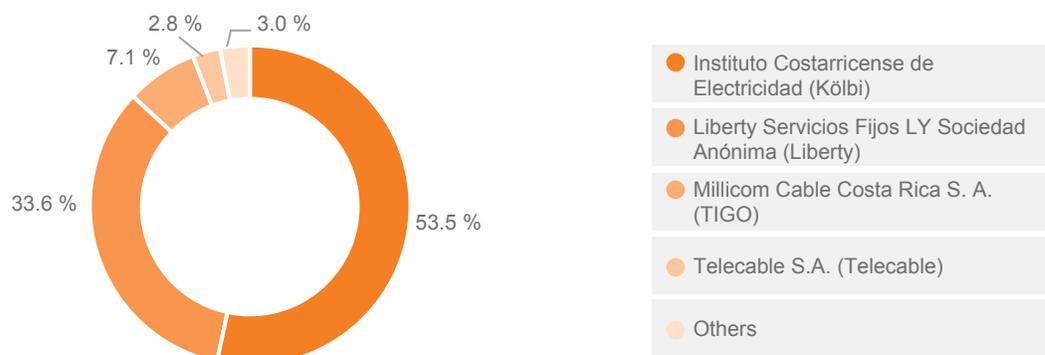
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 59. COSTA RICA: Number of public payphones in operation in 2020-2024
(yearly figures)

2020	2021	2022	2023	2024
3,265	2,905	2,683	2,454	1,790
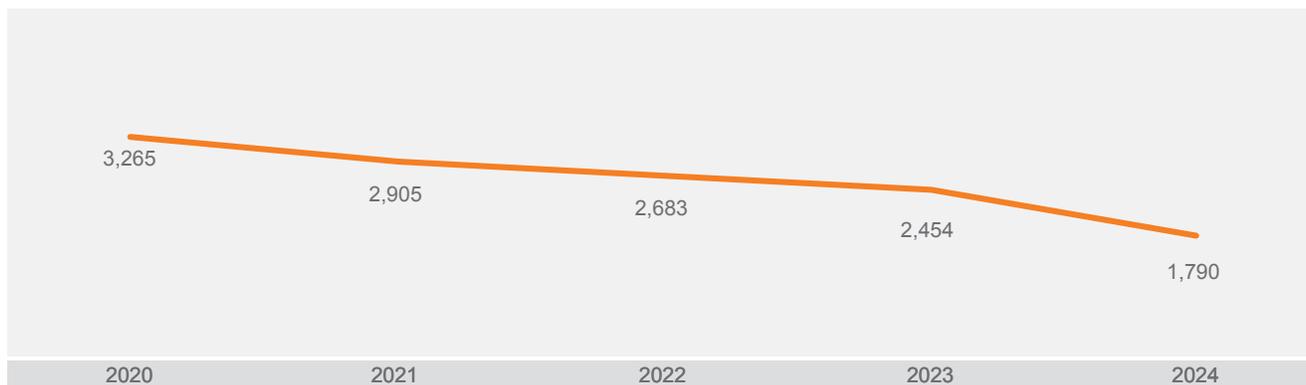
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 60. COSTA RICA: Fixed telephony traffic in 2020-2024
(millions of minutes per year)

Year	Value
2020	1,647
2021	1,353
2022	1,089
2023	805
2024	643
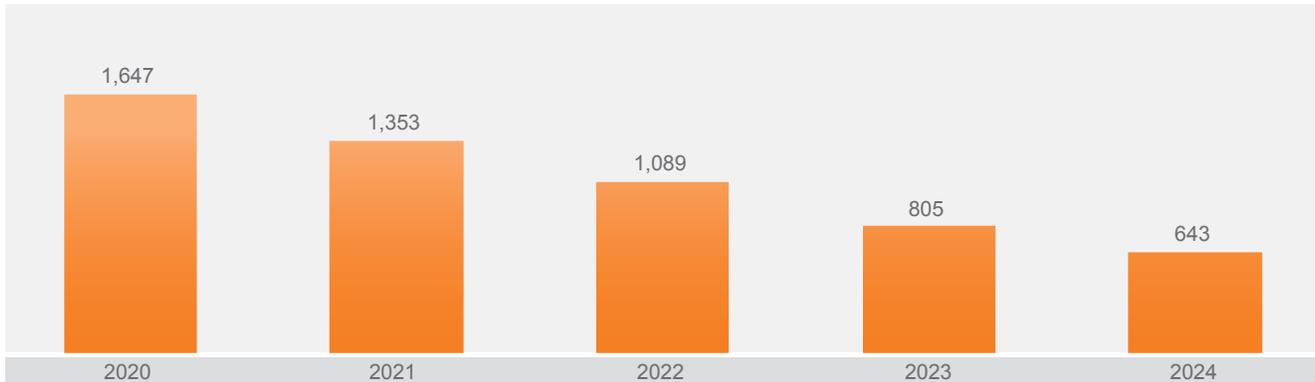
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 61. COSTA RICA: VoIP telephony traffic in 2020-2024
(millions of minutes per year)

Year	Value
2020	183
2021	177
2022	199
2023	239
2024	440
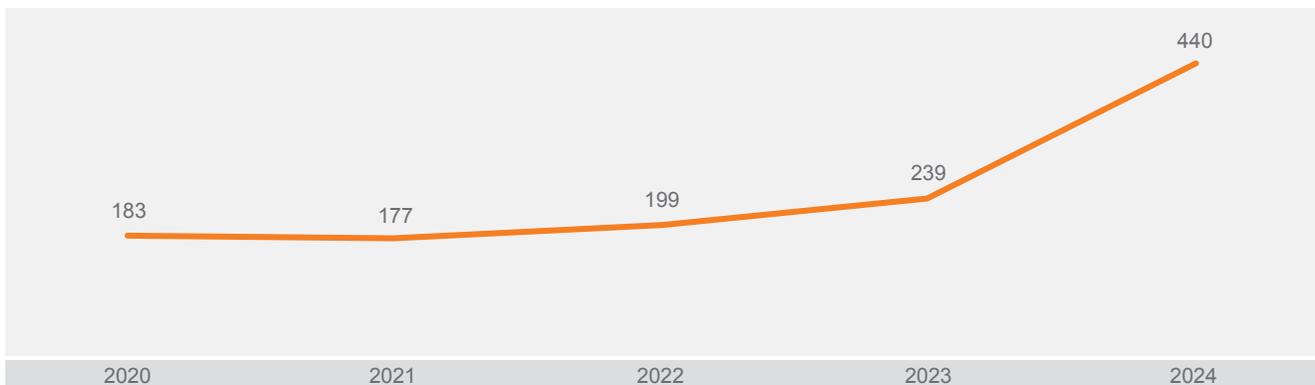
Source: SUTEL, General Directorate of Markets. Costa Rica, 2010-2024.

GRAPH 62. COSTA RICA: Market share of VoIP telephony traffic per service provider in 2023
(Figures in percentage terms)

- Five main operators: 79.6 %
- Remaining Operators: 20.4 %
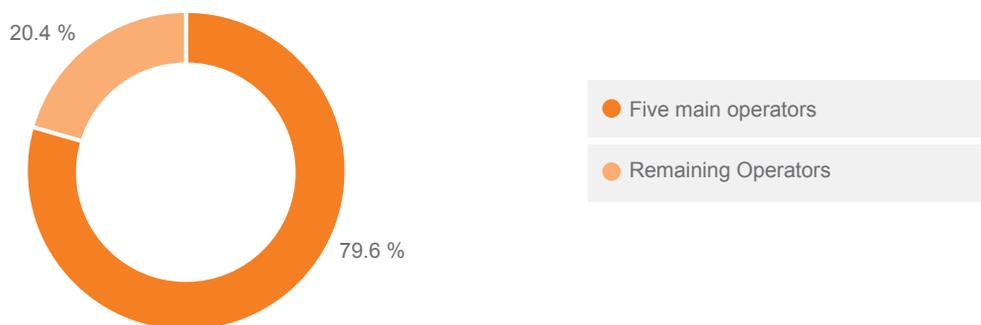
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 63. COSTA RICA: Market share of VoIP subscribers per operator in 2024
(figures in percentage terms)

9.4 %

90.6 %

- Five main operators
- Remaining Operators
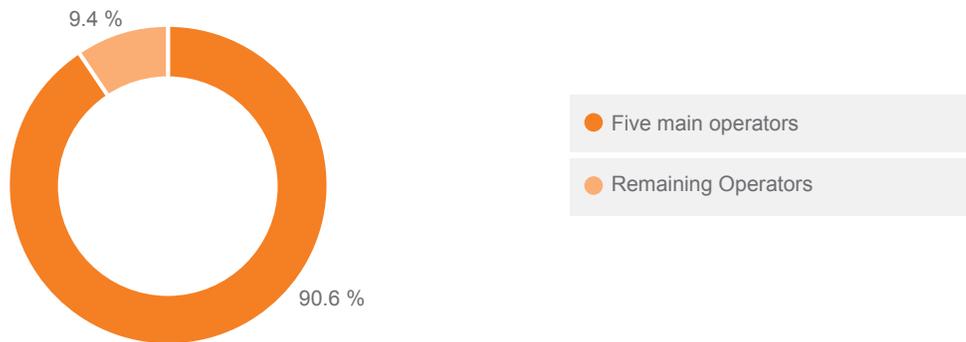
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 64. COSTA RICA: Outbound domestic fixed telephony traffic to fixed and mobile networks in 2020-2024
(yearly figures in thousands of minutes)

	2020	2021	2022	2023	2024
Fixed networks	7,766	6,601	5,303	4,167	3,419
Mobile Networks	911	756	895	628	529

— Fixed networks ••••• Mobile Networks
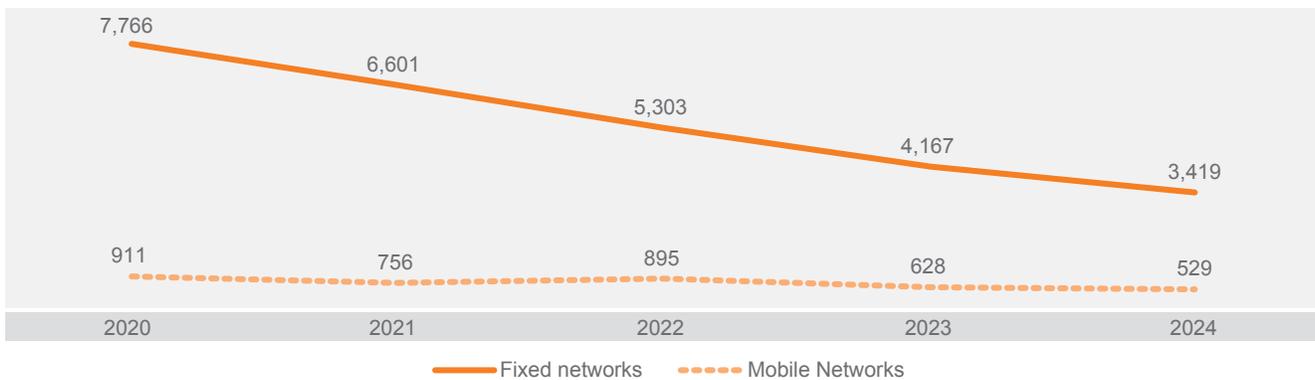
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 65. COSTA RICA: Total inbound fixed telephony traffic in 2020 - 2024
(yearly figures in thousands of minutes)

2020	2021	2022	2023	2024
12,864	11,708	9,935	9,108	6,043
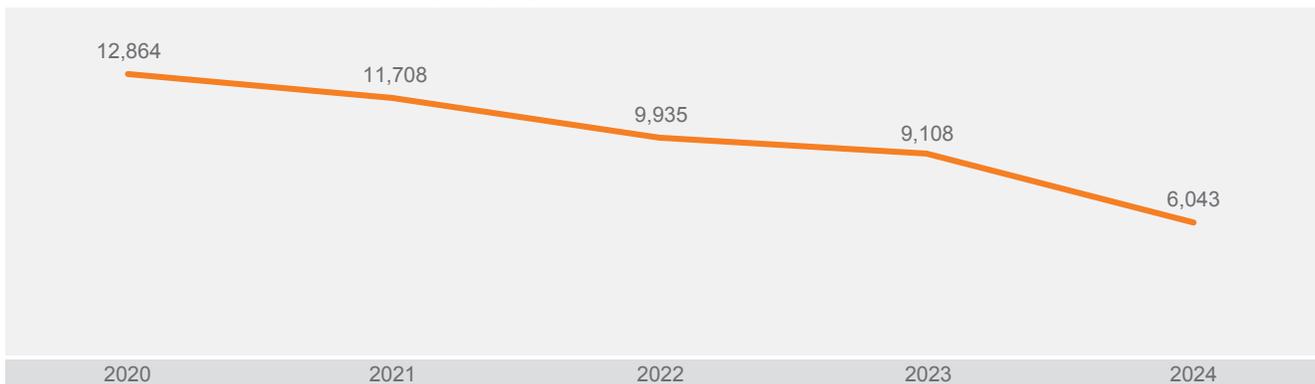
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 66. COSTA RICA: International fixed telephony traffic per type in 2020 - 2024
(yearly figures in thousands of minutes)

	2020	2021	2022	2023	2024
Incoming	676	572	434	422	367
Outgoing	224	217	225	169	155
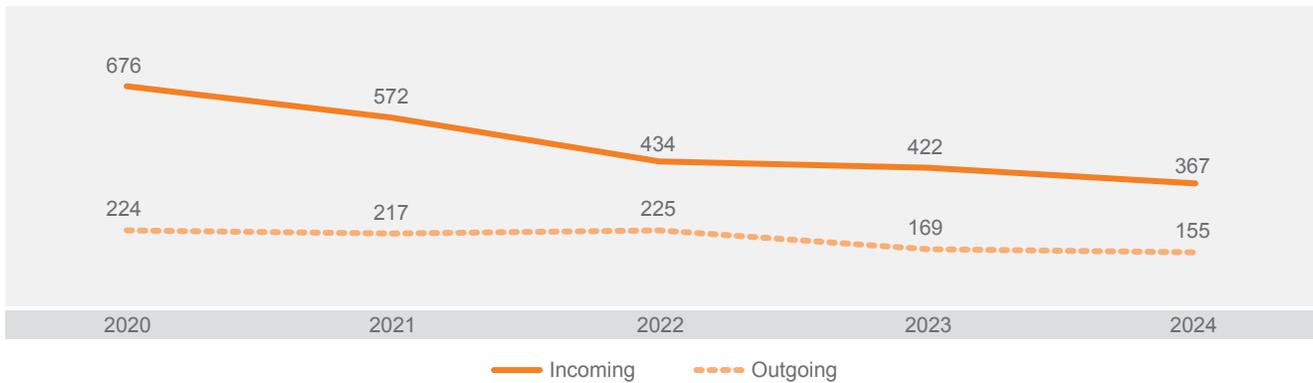
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 67. COSTA RICA: Average traffic per fixed telephony subscriber by type of connection (i.e.: POTS & VoIP) in 2020-2024
(figures in minutes)

|	2020	2021	2022	2023	2024
Basic Traditional	2,902	2,651	2,170	1,563	632
VoIP	3,501	3,117	2,531	893	1,532
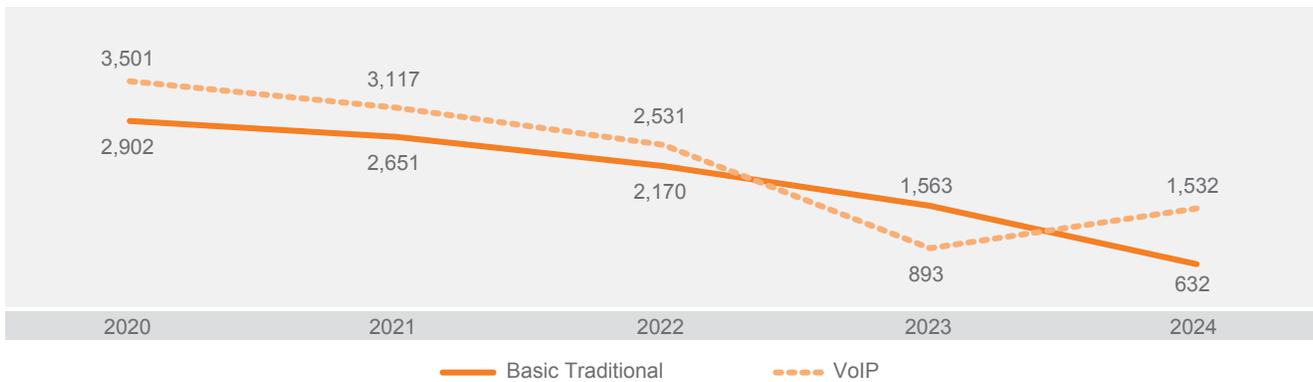
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 68. COSTA RICA: Revenue from fixed telephony services in 2020-2024
(figures in millions of colones)

2020	2021	2022	2023	2024
46,884	37,982	31,791	28,986	31,397
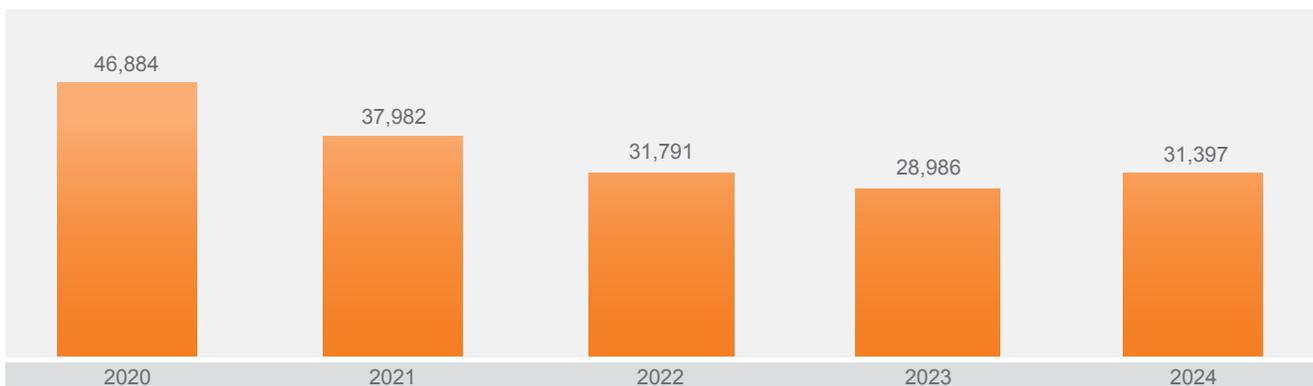
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 69. COSTA RICA: Revenue from VoIP telephony services in 2020-2024
(figures in millions of colones)

Revenue:
- 2020: 6,261
- 2021: 6,205
- 2022: 6,070
- 2023: 7,888
- 2024: 14,519
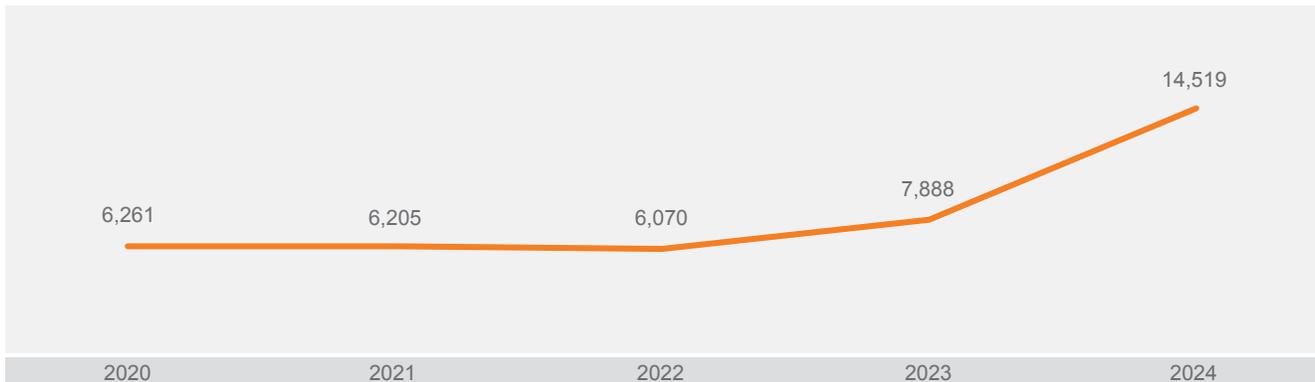
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 70. COSTA RICA: Revenue from international fixed telephony per type of service in 2020 - 2024
(yearly figures in colones)

Outgoing International:
- 2020: 1,139
- 2021: 769
- 2022: 593
- 2023: 425
- 2024: 316

International incoming:
- 2020: 401
- 2021: 415
- 2022: 276
- 2023: 181
- 2024: 126

—— Outgoing International   ···· International incoming
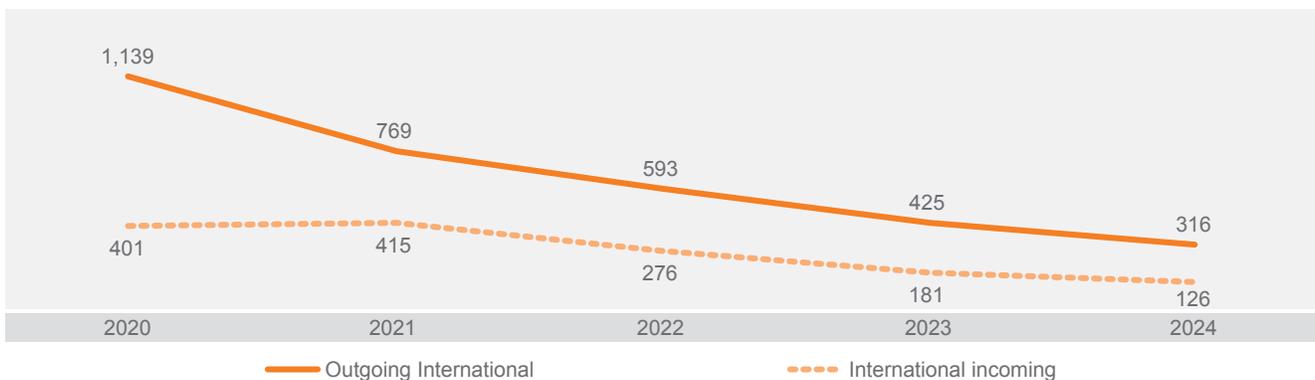
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 71. COSTA RICA: Average revenue per fixed telephony subscriber by type of connection (i.e.: POTS & VoIP) in 2020-2024
(yearly figures in colones)

Basic Traditional:
- 2020: 80,556
- 2021: 71,692
- 2022: 62,663
- 2023: 58,277
- 2024: 52,502

VoIP:
- 2020: 119,624
- 2021: 109,112
- 2022: 77,352
- 2023: 29,487
- 2024: 50,555

—— Basic Traditional   ···· VoIP
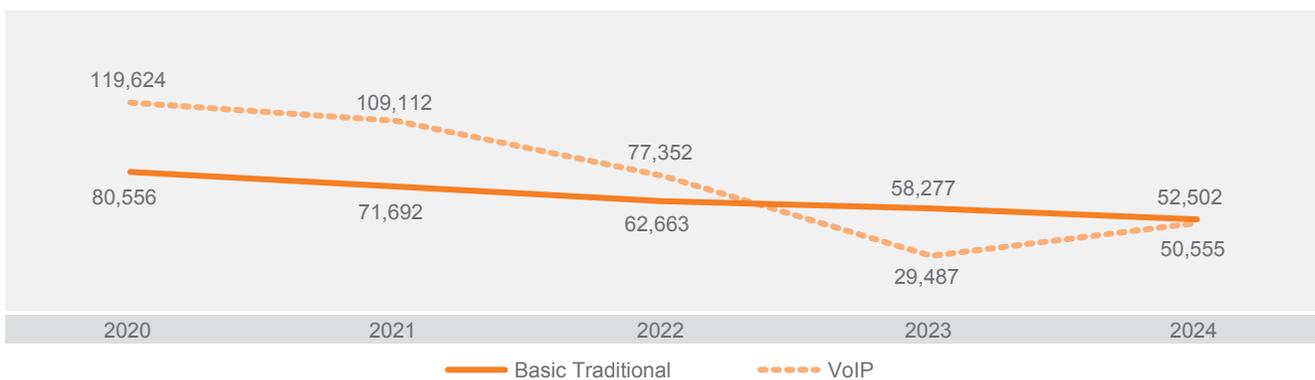
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 72. COSTA RICA: Average revenue per minute of fixed telephony service by type of connection (i.e.: POTS & VoIP) in 2020-2024
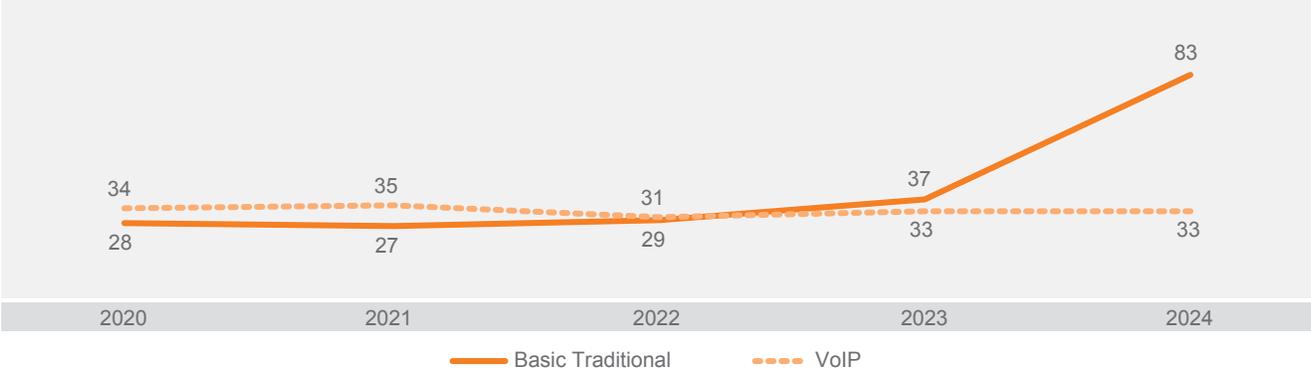
(yearly figures in colones)

	2020	2021	2022	2023	2024
VoIP	34	35	31	37	83
Basic Traditional	28	27	29	33	33

——— Basic Traditional   ---- VoIP

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

Mobile
telecommunications
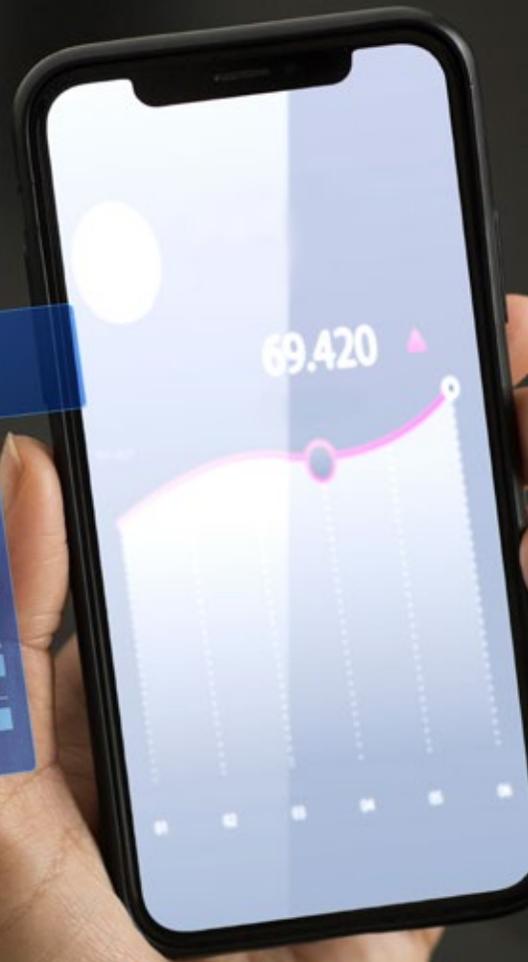
Mobile telecommunications services[26] enable the wireless transmission of data and voice, in which at least one mobile device interacts with another mobile device or a fixed station. They use radio waves for this and are a subset of radio communications.

These services can be classified as maritime mobile, aeronautical mobile, and land mobile, the latter being the subject of this chapter. Therefore, to cover services with these characteristics in a single section, mobile telephony services (broken down into domestic and international telephony), roaming services, and mobile Internet services are included, so that the reader can have an integrated view of these services (mobile-land).

MOBILE TELEPHONY

Subscriptions

Mobile phone service reached 6,977,935 subscriptions at the end of 2024 (see Graph No. 73), an increase of 2.4 % compared to 2023 (6,817,288), as a result of the net effect of a 2.8 % reduction in prepaid subscriptions and an 8.2 % increase in postpaid subscriptions.

This resulted in a penetration rate of 131.9 % (almost 132 subscriptions per 100 inhabitants), which is 2.4 pp above the previous year's figure, ending the downward trend seen in recent years (see Graph No. 74).

Concerning payment methods (see Graphs No. 75 and 77), postpaid continues its upward trend in mobile phone subscriptions, representing 17 % in 2013 and closing 2024 with 49.4 % (the highest share ever).

On the other hand, prepaid accounted for the remaining 50.6 % (see Annex Table No. 47).

In terms of operators in this market at the end of the year, Liberty accounted for 40.1 % of total subscriptions, followed by Kölbi (37.2 %) and Claro (22.7 %). As for market distribution by payment method, Liberty accounted for 43.2 % of prepaid subscriptions, Kölbi for 35.7 %, and Claro for 21.1 %; while in the postpaid segment, Kölbi accounted for 38.8 %, Liberty 36.9 %, and Claro 24.3 % (see Graphs 78 and 79).

> ## Mobile phone service subscriptions increased by 2.4 % compared to 2023

In terms of market concentration, the above market shares result in the Herfindahl-Hirschman Index[27] (HHI)[28] reaching 3507 points in 2024 (see Graph No. 80), classifying this market as concentrated according to the methodology for analyzing the degree of effective competition in telecommunications markets, established by the SUTEL Council in Resolution RCS-082-2015.

Traffic

Voice traffic (measured in minutes) associated with mobile telephone service (including domestic and international) continues its downward trend, reaching 3,398 million minutes, reflecting a 13.9 % decrease compared to 2023 (see Graph No. 81).

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26 One operator made historical changes to prepaid subscriptions from 2019 to 2023, therefore this indicator and some indicators that use it as input for their calculation do not match the previous year's publication. These corrections are updated in SIGITEL.
27 https://es.wikipedia.org/wiki/Indice_de_Herfindahl. The Herfindahl-Hirschman Index [HHI] is a measurement used in economics to determine the degree of economic concentration in a market. Or, conversely, the lack of competition. A high index value indicates a highly concentrated and anti-competitive market.
28 The HHI for 2016 (the year in which mobile telecommunications services were declared to be in a state of competition) was 3891 points.

This reduction is reflected in a decrease in average monthly minutes consumed per subscriber, which fell from 48 minutes per month in 2023 to 41 minutes in 2024 (-15.9 %, the largest annual decline on record).

However, when analyzing average monthly consumption per subscriber by payment method, postpaid subscribers went from 82 to 66 minutes in 2024 (-19.1 %), while prepaid subscribers contracted from 19 to 15 minutes (-17.4 %) (see Graph No. 82).

An important fact that marks the year 2024 is that the ratio between postpaid and prepaid traffic reaches its maximum quotient (gap) with 4.2 minutes for the year 2024 compared to 3.9 minutes recorded in 2023 (an upward trend since 2014), i.e., for every minute of prepaid traffic, just over 4 minutes of postpaid traffic is consumed, as a result of the growing share of this category, reaching 80.8 % in 2024 compared to 19.2 % for prepaid traffic (see Graph No. 83).

In terms of call destinations, 47.2 % corresponded to mobile calls within the operator's own network (on net), while calls to other mobile networks (off net) accounted for 28 %, calls to different fixed telephone networks accounted for 22 %, and international calls accounted for 2.8 %, showing that consumer behavior has remained similar to previous years. However, it should be noted that the only increase in share was for calls to different fixed telephone networks, with +1.9 pp compared to 2023 (see Graph No. 84).

In the case of text messaging, in 2024, 1,502 million messages were sent (+4 % compared to 2023), continuing the upward trend since 2022. Of these messages, 99.9 % were sent domestically, while 0.1 % were sent internationally. Despite this slight increase in messaging, the average monthly message traffic per user remained at 18 for 2023 and 2024 (see Graphs 85 and 86).

Domestic mobile telephony

Total outgoing traffic to domestic destinations continues its downward trend, reaching 3,302 million minutes, down 13.7 % from the previous year (one of the largest historical declines).

Of this outgoing traffic, calls within the same mobile network (on-net) accounted for 48.6 %, followed by traffic generated by calls terminated on other mobile networks (off-net) with 28.8 % and traffic generated by calls terminating in fixed telephone networks with 22.6 %. It is important to note that the only call destination that grew was to fixed telephony (1.8 pp compared to 2023) (see Graph No. 87) .

In the case of domestic messaging, there was an increase of 4.1 %, reaching 1,500 million messages, of which 76.1 % were sent to other networks (off-net) and 23.9 % within the same network (on-net) (see Graph No. 88).

International mobile telephony

Since 2020, international voice call traffic has been on a downward trend, reaching 232 million minutes in the year under review (-20.5 % compared to 2023, the largest historical decline). Of this total, 58.5 % corresponds to incoming international calls and 41.5 % to outgoing international calls (see Graph No. 89).

Finally, text messaging traffic, like voice traffic, continues to decline, falling from 3 million messages (in 2023) to 2 million in 2024 (-29.2 %) (see Graph No. 90).

Overall, for mobile telephony service, total voice traffic or consumption (measured in minutes) decreased

by 13.9 % compared to 2023, based on a 17.4 % decrease in average monthly traffic per prepaid subscriber and a 19.1 % decrease in its postpaid counterpart (a category that represents 80.8 % of total traffic), causing an increase in the gap in minutes per user between these modalities (4.1 postpaid minutes for every prepaid minute).

Revenue

In relation to mobile telephony revenue (including domestic and international), 2024 saw a change in the downward trend; however, the figure is similar to the previous year (even with a 2.4 % increase in subscriptions), as revenue grew by 1 % compared to 2023, reaching 179,691 million colones, given that both the voice and text messaging components grew slightly (1 % and 0.5 %, respectively, compared to 2023).

It is important to note that the shares of these components (voice and messaging) within revenues are quite dissimilar, as 98.1 % of revenues come from voice and 1.9 % from text messaging (see Graph No. 91).

From a sub-service perspective, 95.6 % of total revenue comes from domestic mobile telephony, which increased its share by 0.4 pp compared to 2023, while 4.4 % comes from international mobile telephony, maintaining relatively constant shares throughout the analysis period (see Graph No. 92).

Considering that revenue increased to a lesser extent than subscriptions compared to 2023, revenue per subscription decreased, resulting in each subscriber contributing an average of 2,146 colones per month (-1.3 % compared to 2023), of which 40 colones are from text messaging and 2,106 from voice (-1.8 % and -1.3 %, respectively, compared to the previous year). It is worth noting that revenue per user continues to decline (see Graph No. 93).

By payment method, postpaid accounts for 89.2 % of mobile telephony revenue (+2.8 percentage points compared to 2023), while prepaid accounts for 10.8 %, meaning that for every colón generated from prepaid services, there are 8.2 colones from postpaid

services, which is the highest ratio for the period under analysis (see Graph No. 94).

Domestic mobile telephony

Revenue remained virtually unchanged, showing a slight increase of 1.4 % compared to 2023, reaching 171,804 million colones, of which 98.2 % came from domestic voice revenues and 1.8 % from domestic text messaging (see Graph No. 95).

It is important to note that voice revenues increased by 1.4 %, reaching a total of 168,772 million colones, driven by 4.8 % growth in revenues from outgoing calls, compared to a 24.9 % decrease in revenues from incoming call traffic (see Graph No. 96).

Domestic text messaging contributed 3,032 million colones at the end of 2024, the second lowest figure reported for the year under review, + 0.9 % compared to 2023 (see Graph No. 97).

International mobile telephony

Revenue from international mobile telephony reached 7,887 million colones at the end of the year under review (-7.1 % compared to the previous year), the lowest figure on record, reinforcing its downward trend. Of this revenue, 96 % corresponds to voice revenue and 4 % to text messaging (see Graph No. 98).

With regard to international voice revenue (7,571 million colones recorded in 2024), 58.4 % is generated by outgoing international calls and the rest (41.6 %) by incoming international calls. From the point of view of payment method, the ratio is very similar between them, with 45.1 % coming from prepaid and 54.9 % from postpaid (see Graphs 99 and 100).

Overall, total mobile telephony revenue grew by 1 %, even though subscriptions increased by 2.4 %. This (the increase in subscriptions being greater than the increase in revenue) is due to mobile phone users consuming fewer minutes (total traffic decreased by 13.9 %), supported by the drop in telecommunications service prices (see Graph No. IPTM1 in the Commercial Offers and Prices chapter).

ROAMING

Roaming services allow users to continue using their mobile phones and devices to make and receive voice calls and text messages, and to browse the Internet, while traveling in another country. The data on traffic and revenue reported in 2024 is shown below.

Traffic

By 2024, voice traffic reached 49 million minutes (17.8 % compared to 2023). This traffic comes from 88.3 % inbound voice roaming and 11.7 % outbound voice roaming, with this share remaining very similar over the last 5 years (see Graph No. 101).

Text messaging roaming reached 34 million messages, representing significant growth of 53.7 % compared to the previous year. This amount comes from 51.1 % of incoming roaming text messaging and 49 % of outgoing roaming text messaging (see Graph No. 102).

In another scenario, data roaming revenues reached their highest level in the last five years (7,389 TB) and continue their upward trend, being 40.3 % higher than the previous year, of which 21.3 % is from outgoing data roaming and 78.7 % from incoming data roaming (shares that have remained very similar during the period analyzed) (see Graph No. 103).

Revenue [29]

Total outgoing roaming revenues decreased by 9.7 % compared to the previous year, as a result of declines in voice, data, and messaging revenues of 14.3 %, 4.8 %, and 42.6 %, respectively.

It is important to note that the share of total roaming revenue is distributed as follows: 78.6 % for data, 15.8 % for voice, and 5.6 % for messaging. Following up on the share by component, it is important to note that, over the five-year period under review, roaming data revenues maintain an increasingly larger share, rising from 36.8 % in 2020 to 78.6 % in 2024, while voice has been the component that has lost the most share, falling from 46.6 % to 15.8 % over the same period (see Graphs 104, 105, 106, and 107).

In conclusion, roaming service for the last five years continues its upward trend in data usage, while voice loses market share; however, total revenues are down 9.7 %, as all components declined (-4.8 % data, -42.6 % messaging, and -14.3 % voice).

MOBILE INTERNET

Subscriptions

Mobile Internet closed 2024 with 5,315,598 subscriptions, representing a variation of +2.5 % from 2023 to 2024, continuing its upward trend in the years studied (see Graph No. 108).

When comparing these subscriptions by payment method and device, i.e., comparing data card subscriptions and mobile phone subscriptions divided into prepaid and postpaid, we find that at the end of 2024, 58.7 % belong to the postpaid category, 38.7 % to prepaid (maintaining its downward trend), and 2.6 % to data card (a share that remained the same as in 2023) (see Graph No. 109).

With regard to market distribution, at the overall level (mobile Internet), Kölbi accounted for 42.2 % of subscriptions, followed by Liberty with 34.5 % and Claro with 23.3 %.

However, when analyzing market distribution by payment type, in postpaid, Kölbi accounted for 42.2 %, followed by Liberty with 32.5 % and Claro with 25.3 %, while in prepaid, 39.5 % corresponds to Kölbi, 39.4 % to Liberty, and 21.1 % to Claro. Finally, in the case of data cards, 84 % corresponds to Kölbi, 9.7 % to Claro, and 6.3 % to Liberty (see Graph No. 110).

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29 In terms of revenue, roaming is accounted for as outgoing roaming, since incoming roaming (users of other non-domestic operators who use roaming in our country) is considered wholesale revenue by the International Telecommunication Union.

In terms of speeds, in the postpaid category, the highest concentration is found in speeds between 8 Mbps < V <= 15 Mbps with 47.6 %, followed by 2 Mbps < V <= 5 Mbps representing 42 %, V <= 2 Mbps with 8 %, and speeds of 5 Mbps < V <= 8 Mbps with 2.4 %. It is important to note that there is a 3.8 pp increase in the share of the speed range between 8 Mbps < V <= 15 Mbps compared to 2023 (see Graph No. 112).

In terms of prepaid, 60.6 % corresponds to speeds between 5 Mbps < V <= 8 Mbps, followed by 39.4 % for 8 Mbps < V <= 15 Mbps, with the shares of speeds remaining virtually unchanged between 2023 and 2024 (see Graph No. 113).

In the case of data cards, the shares by speed remained virtually unchanged between 2023 and 2024, with speeds of 5 Mbps < V <= 8 Mbps attracting the highest number of subscriptions, at 82.7 % at the end of 2024 (see Graph No. 114).

In relation to the proportion of mobile Internet subscriptions versus the number of fixed Internet subscriptions, there is an increase from 4.5 to 4.6 mobile Internet subscriptions for each fixed Internet subscription for the year 2024 (see Graph No. 115).

Finally, with regard to the number of subscriptions per 100 inhabitants (penetration), there is an increase of 2 pp, reaching 100.5 % by 2024, compared to 98.5 % in 2023 (see Graph No. 116).

Traffic

Data traffic reached a total of 477,399 TB, the highest figure ever recorded (+14.6 % compared to 2023). It is important to note that this increase is consistent with the growth in subscriptions (see Graph No. 117).

This increase in data traffic is caused by the increase in prepaid consumption with 28 %, followed by postpaid with 14 %, while data cards decreased by 4.8 %, all in relation to the previous year (see Graph No. 118).

In terms of composition, postpaid accounts for 86.2 % of total traffic at the end of the year under review, followed by 10.8 % for prepaid and 3 % for data cards (see Graph No. 119).

From the point of view of total consumption, for every 1 GB of prepaid consumed, there are 8 GB of postpaid (the previous year the ratio was 9 GB postpaid for every GB prepaid). The previous result of a smaller gap between these modalities can be explained from the perspective of average consumption. The previous result of a smaller gap between these modalities is explained from the perspective of average monthly consumption per user, since a postpaid user consumed an average of 11.3 GB in 2024 (6.8 % more than in 2023) , while growth was higher for prepaid users, who consumed 2.1 GB (+32.1 % compared to 2023) (see Graph No. 120).

With regard to speeds, it can be seen that in the postpaid service, most traffic occurs between speeds of 8 Mbps < V <= 15 Mbps with 46.1 %, followed by speeds of 5 Mbps < V <= 8 Mbps with 44.4 % and the remainder with speeds below 5 Mbps. It is important to note that the share of the highest speed range increased compared to 2023 (see Graph No. 121).

In the case of prepaid, 61.7 % of traffic is at speeds of 8 Mbps < V <= 15 Mbps (+21.8 pp compared to 2023) and the remaining 38.3 % at speeds of 5 Mbps < V <= 8 Mbps, showing a shift in share to higher speeds compared to 2023 (see Graph No. 122).

Finally, for data cards, a large part of their traffic is at speeds between 8 Mbps < V <= 15 Mbps, accounting for 44.5 %, with the remainder at lower speeds; however, it is important to note that there is an increase in the share of the higher speed range between 2023 and 2024 of +2.3 pp (see Graph No. 123).

Revenue

Revenue from mobile Internet service for 2024 increased by 10.1 % compared to 2023 (the largest increase in the analysis period and above the annual average of 4.8 %), totaling 307,494 million colones (see Graph No. 124).

When observing the share of revenue by payment method and device in 2024, revenue from data cards

represents 3.1 % (9,603 million colones, down 2.4 % from the previous year); prepaid services for 15.3 % (46,981 million colones, down 2.8 % from 2023), and postpaid services for 81.6 % (250,910 million colones, up 13.4 % from the previous year); where the latter payment method the one that drives the increase in revenue (see Graph No. 125).

It is important to note that revenues increased despite the fact that mobile telecommunications prices showed a downward trend at the end of 2024, so this increase in revenue is due to the increase in traffic in both categories, especially prepaid (28 %).

Next, in relation to the breakdown by contracted speed for revenues associated with the postpaid category, it can be seen that 48.2 % of revenue is obtained from subscribers with contracted speeds between 8 Mbps < V <= 15 Mbps, 45.8 % from the speed range 2 Mbps < V <= 5 Mbps, 3.5 % for connections of V <= 2 Mbps, and finally, 2.5 % of subscribers with speeds of 5 Mbps < V <= 8 Mbps, reflecting a significant increase (+10.8 pp) in the share of the higher speed range compared to 2023 (see Graph No. 126).

In the case of prepaid, 54 % of revenue comes from connections at speeds between 5 Mbps < V <= 8 Mbps and 46 % comes from the speed range of 8 Mbps < V <= 15 Mbps, thus increasing, as with postpaid, the share of higher speeds (+1.1 pp) (see Graph No. 127).

For data card devices, the share in the 5 Mbps to 8 Mbps range was 74.4 % of the total, followed by 12.5 % for the 8 Mbps to 15 Mbps range, 6.8 % for 2 Mbps < V <= 5 Mbps, and 6.3 % for speeds V <= 2 Mbps, showing a very similar share to the previous year (see Graph No. 128).

Finally, with regard to the average monthly income per user, there is a greater difference between categories in relation to previous years, since in prepaid the average for 2024 was 1,902 colones (+0.3 % compared to 2023), while postpaid had a higher growth, reaching 6,706 colones (+6.3 % compared to 2023). In the case of data cards, it fell to 5,760 colones (-4.7 % compared to the previous year). From another perspective, for 2024, for every colón of prepaid, there are 5.3 colones of postpaid, while in 2023 this ratio was 4.6 colones (see Graph No. 129).

In summary, 2024 saw growth in mobile Internet subscriptions (+2.5 %), driven mainly by postpaid plans (+6.7 % compared to 2023), and a slight increase in data cards (+2.4 %), while prepaid subscriptions fell by 3.2 %. The growth led to an increase in traffic (+14.6 % compared to 2023) because the average monthly traffic per user increased in postpaid and, to a greater extent, in prepaid (6.8 % and 32.1 % respectively), resulting in a 10.1 % increase in revenue.

At this point, all mobile revenues (mobile telephony, roaming, and mobile Internet) can be added together to obtain an estimate of the total revenue generated by mobile telecommunications networks, which closed 2024 at 489,781 million (6.4 % higher than in 2023), driven by the increase in mobile data (10.1 %) and mobile telephony (1 %), but offset by the decrease in roaming revenues (-9.7 %), in addition to the weighting of mobile Internet in relation to total mobile telecommunications revenues being 62.8 % (the highest figure recorded to date and maintaining its upward trend), followed by mobile telephony (voice) with 36.7 % (a service that continues its downward trend to date) and, finally, roaming with 0.5 % (see Graph No. 130).

In terms of payment methods for mobile telecommunications, at the end of 2024, postpaid accounted for 86.4 %, while prepaid accounted for the remaining 13.6 %. It should be noted that the share between these categories has generated an increasingly wide gap, since, for example, in 2020, for every colón generated from prepaid, 3.4 colones were generated from postpaid, a situation that widened to 6.3 colones at the end of 2024 (see Graph No. 131).

In addition, it should be noted that, in the year under review, at the user level, the prepaid category represents a monthly average of 1,307 colones (-8.3 % compared to 2023), while postpaid represents 10,229 colones (practically unchanged from the previous year, +0.9 %). These amounts indicate that, at the user level, postpaid mobile telecommunications users represent 7.8 times the revenue contributed by prepaid users (see Graphs 131 and 132).

In summary, it is clear that postpaid plans in the mobile telecommunications market are becoming increasingly popular in terms of subscriptions, despite the fact that they are not yet the most prevalent type of mobile phone plan, but they are continuing to grow. Furthermore, from the point of view of traffic and revenue, the positioning of this model over prepaid is notable, and finally, it is important to highlight the sustained growth of mobile data, in contrast to what is happening with the voice component.

Portability

In 2024, portability saw the largest decline in successful portings since its inception in 2014 (see Graph No. 133), with a decrease of 89,451 ports compared to 2023, reaching 260,762 ports (-25.5 %) at the end of the year.

Notwithstanding the above, it should be noted that number porting is a major advantage for users, as it gives customers the option to transfer their numbers to whichever operator that best satisfies their needs, and reinforces the existing competitive dynamics of mobile telecommunication services in general.

GRAPH 73. COSTA RICA: Mobile telephony subscriptions, 2020 -2024
(yearly figures in thousands of subscribers)

	2020	2021	2022	2023	2024
Mobile telephony	7,173	7,124	6,938	6,817	6,978
Postpaid	2,506	2,695	3,002	3,184	3,446
Prepaid	4,666	4,429	3,935	3,633	3,532

Legend: Postpaid, Prepaid, Mobile telephony
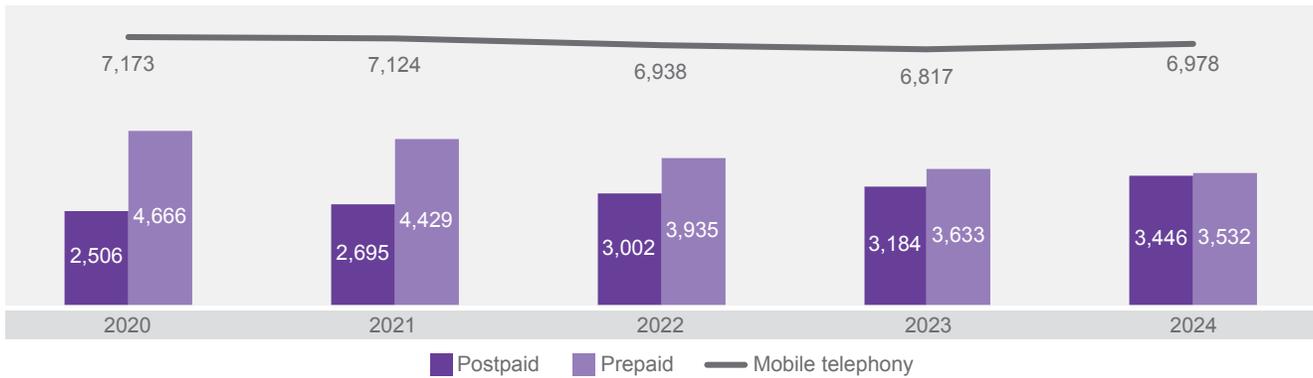
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 74. COSTA RICA: Mobile telephony service subscribers per 100 inhabitants, 2020-2024
(yearly figures in percentage terms)

2020	2021	2022	2023	2024
140.3 %	138 %	133.1 %	129.6 %	131.9 %
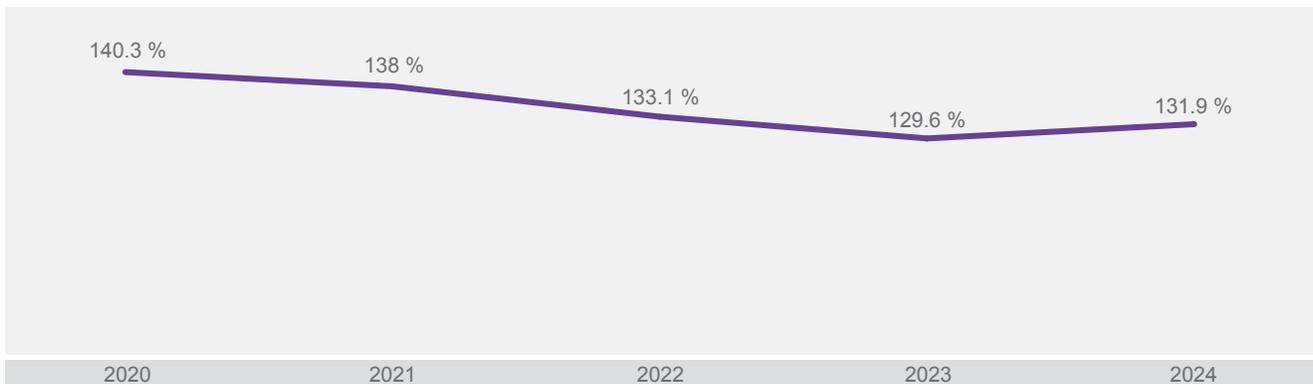
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 75. COSTA RICA: Percentage of subscribers per payment plan, 2020-2024
(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Postpaid	34.9 %	37.8 %	43.3 %	46.7 %	49.4 %
Prepaid	65.1 %	62.2 %	56.7 %	53.3 %	50.6 %

Legend: Prepaid, Postpaid
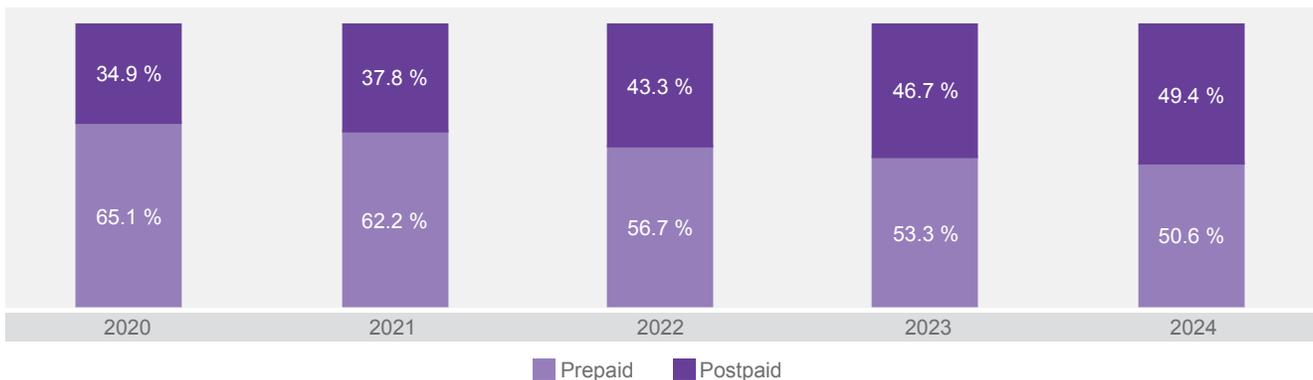
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 76. COSTA RICA: Distribution of mobile phone subscriptions by operator, 2020—2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Liberty	35.7 %	36.6 %	39.1 %	40.3 %	40.1 %
Claro	21.2 %	21 %	24 %	22.6 %	22.7 %
Kölbi	43 %	42.4 %	36.9 %	37.1 %	37.2 %

■ Kölbi ■ Claro ■ Liberty ■ Fullmóvil
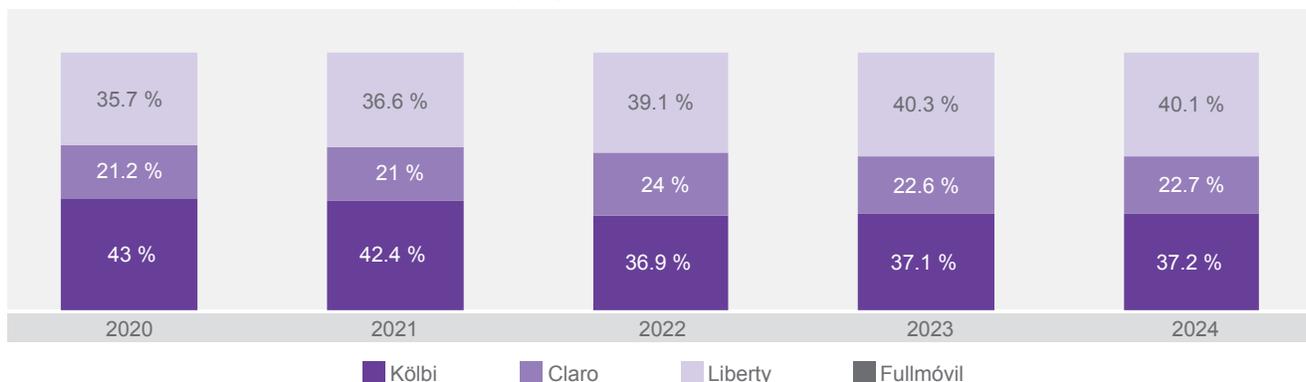
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 77. COSTA RICA: Annual growth rate of mobile telephony subscriptions per payment plan, 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Postpaid	3.7 %	7.5 %	11.4 %	6.1 %	8.2 %
Prepayment	-2.9 %	-5 %	-11.2 %	-7.7 %	-2.8 %

■ Year-on-year variation in prepayment ■ Year-on-year variation in postpaid
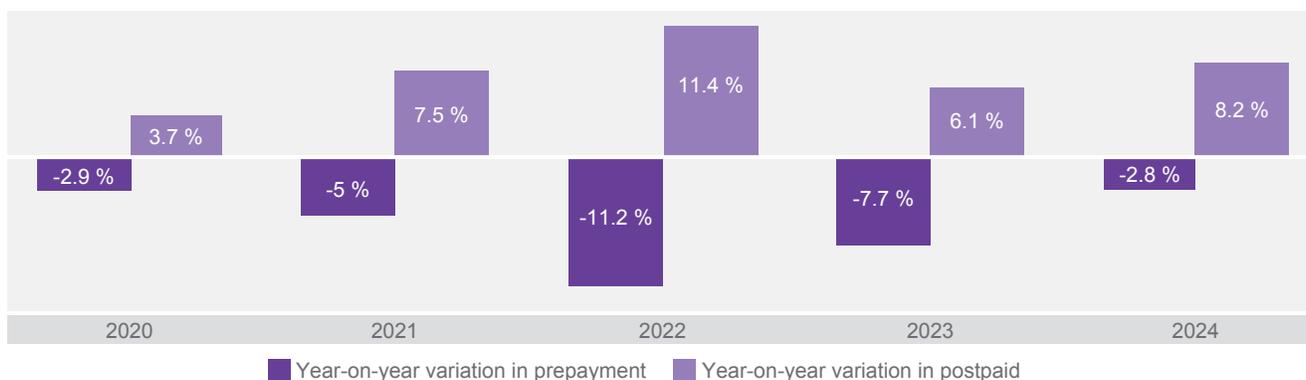
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 78. COSTA RICA: Distribution of mobile phone subscriptions by operator, 2020—2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Liberty	35.7 %	36.6 %	39.1 %	40.3 %	40.1 %
Kölbi	43 %	42.4 %	36.9 %	37.1 %	37.2 %
Claro	21.2 %	21 %	24 %	22.6 %	22.7 %
Fullmóvil	0.1 %				

■ Fullmóvil ■ Claro ■ Kölbi ■ Liberty
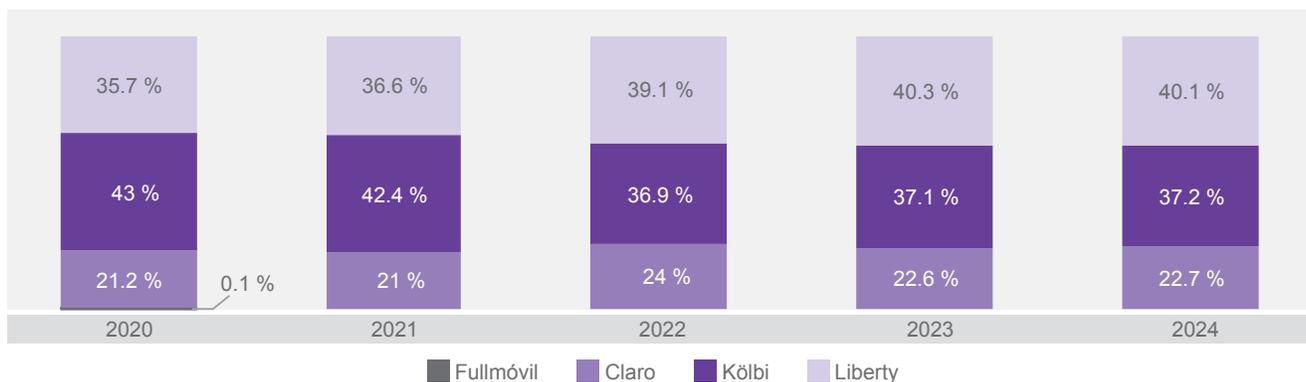
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 79. COSTA RICA: Percentage of mobile telephony subscribers per operator by payment plan, 2024
(yearly figures in percentage terms)

Postpaid:
- Liberty: 43.2 %
- Claro: 21.1 %
- Kölbi: 35.7 %

Prepaid:
- Liberty: 36.9 %
- Claro: 24.3 %
- Kölbi: 38.8 %

Legend: Kölbi, Claro, Liberty
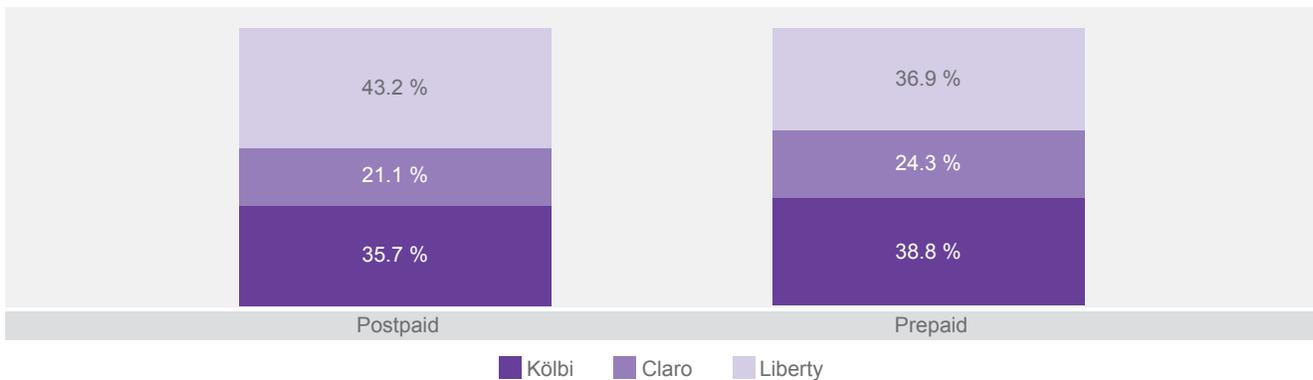
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 80. COSTA RICA: Costa Rica: Evolution of the HHI per year, 2020-2024
(yearly figures)

2020	2021	2022	2023	2024
3,572	3,579	3,466	3,513	3,507
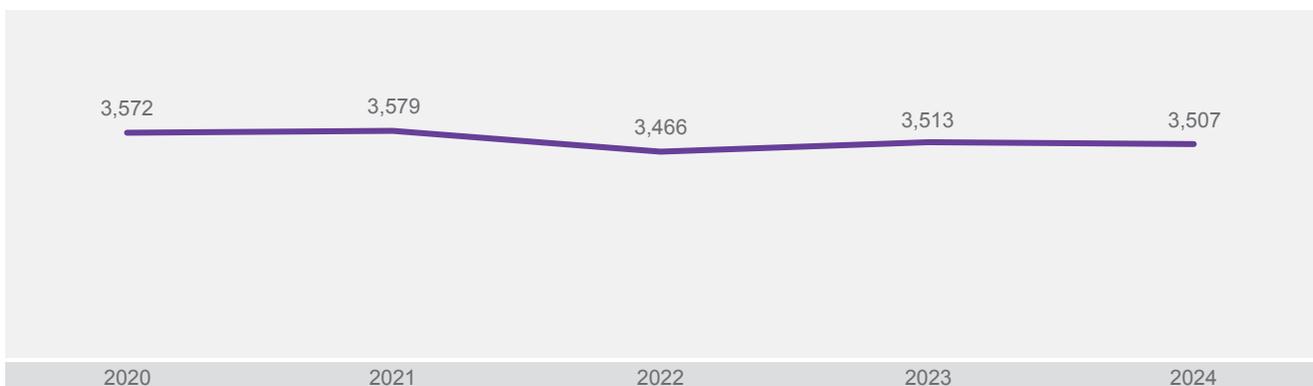
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 81. COSTA RICA: Total outgoing mobile phone service traffic[1] and its distribution by call destination, 2020-2024
(figures in millions of minutes)
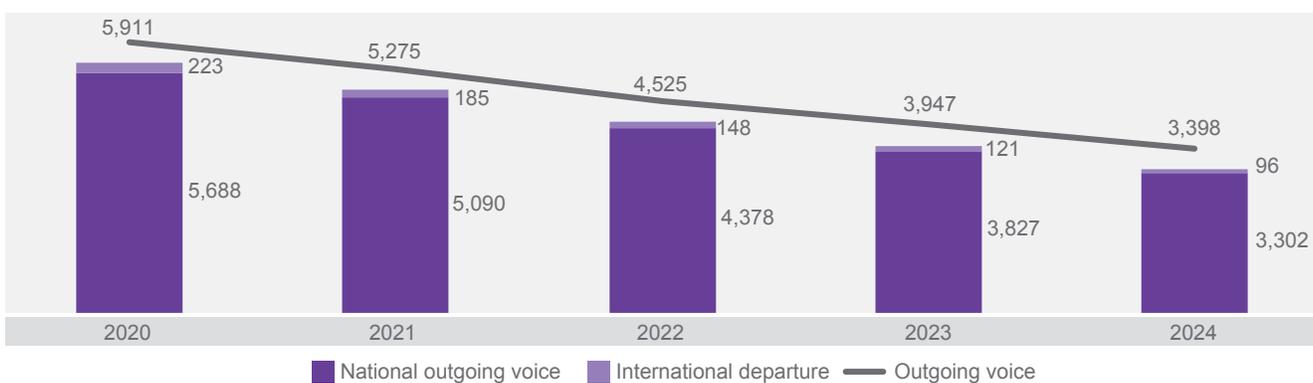
	2020	2021	2022	2023	2024
Outgoing voice	5,911	5,275	4,525	3,947	3,398
International departure	223	185	148	121	96
National outgoing voice	5,688	5,090	4,378	3,827	3,302

Legend: National outgoing voice, International departure, Outgoing voice

1 Only includes national and international voice minutes, excludes roaming.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 82. COSTA RICA: Average monthly voice traffic of mobile telephone service[1] per subscriber according to payment method, 2020-2024

(figures in minutes per month by type of subscriber)
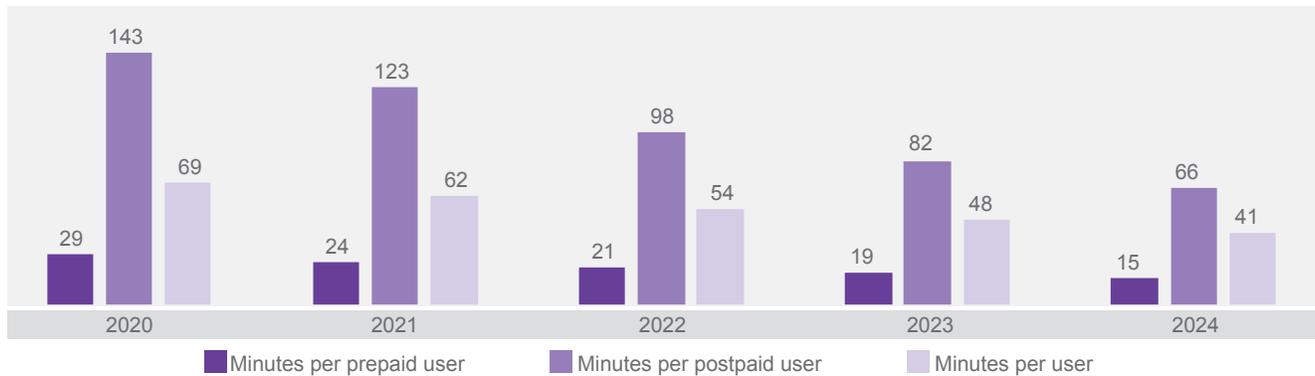
- Minutes per prepaid user
- Minutes per postpaid user
- Minutes per user

1 Only includes national and international voice minutes, excludes roaming.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 83. COSTA RICA: Distribution of total voice traffic associated with mobile phone service by payment method[1], 2020-2024

(figures in millions of minutes and in percentage terms)
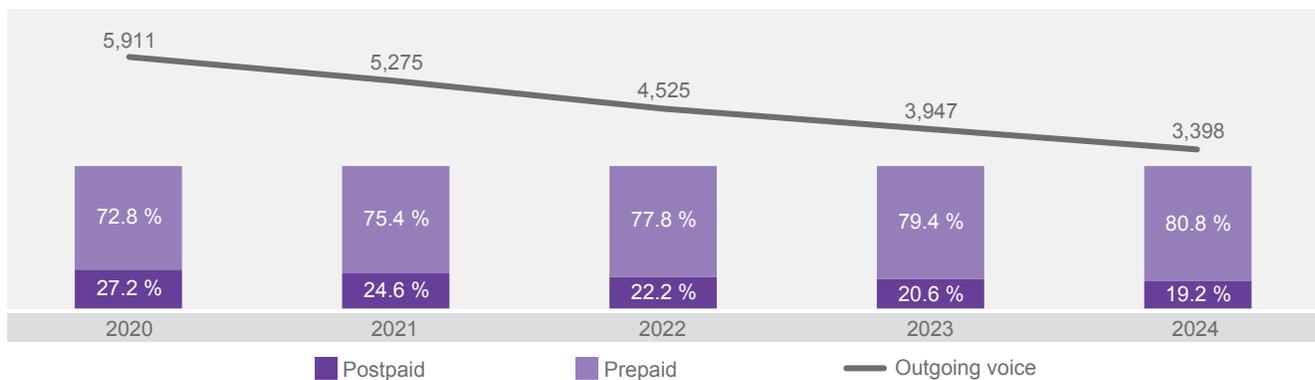
- Postpaid
- Prepaid
- Outgoing voice

1 Only includes national and international voice minutes, excludes roaming.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 84. COSTA RICA: Distribution of total voice traffic associated with mobile phone service by destination[1], 2020-2024

(yearly figures in percentage terms)
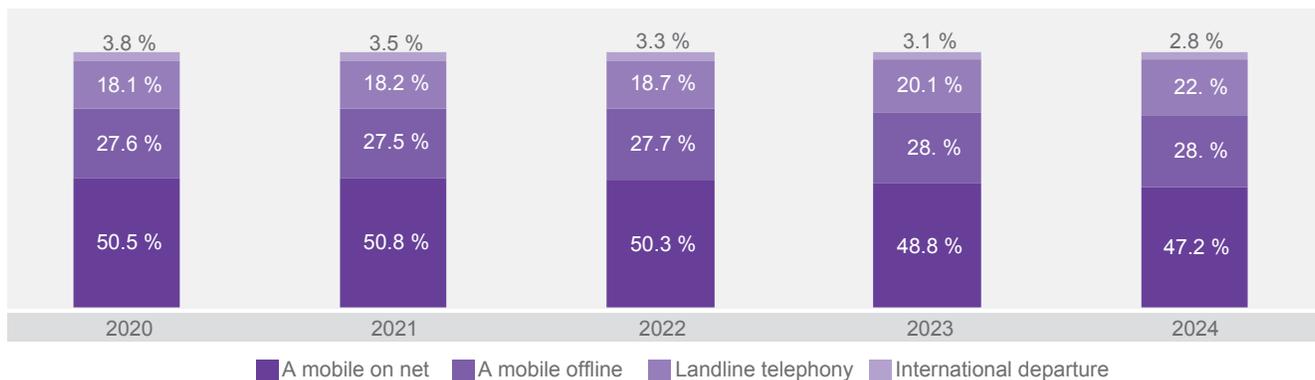
- A mobile on net
- A mobile offline
- Landline telephony
- International departure

1 Only includes national and international voice minutes, excludes roaming.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 85. COSTA RICA: Total and distribution of SMS traffic associated with mobile phone service[1], 2020-2024

(yearly figures in millions of messages)
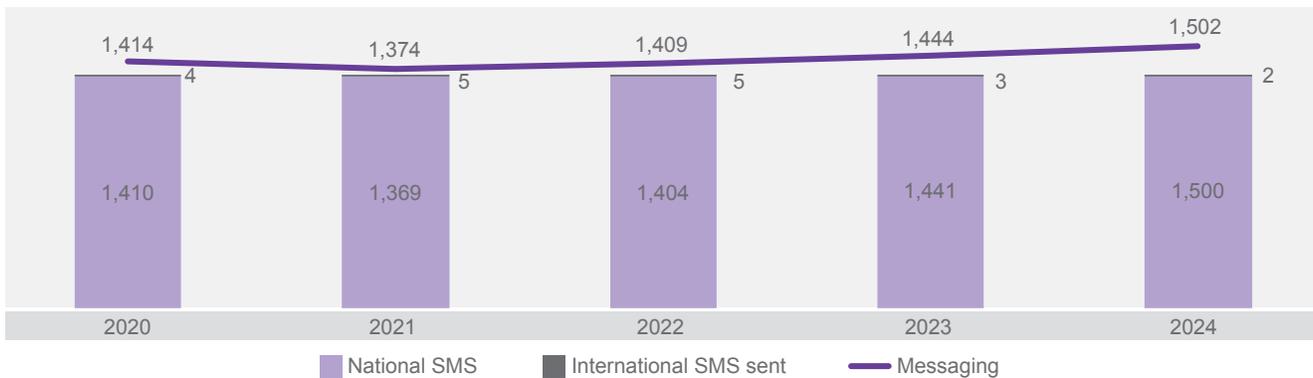
	2020	2021	2022	2023	2024
Messaging	1,414	1,374	1,409	1,444	1,502
International SMS sent	4	5	5	3	2
National SMS	1,410	1,369	1,404	1,441	1,500

■ National SMS ■ International SMS sent — Messaging

1 Only includes messages sent nationally and internationally, excludes roaming.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 86. COSTA RICA: Average monthly SMS traffic associated with mobile phone service[1], 2020-2024

(figures in average of monthly messages)
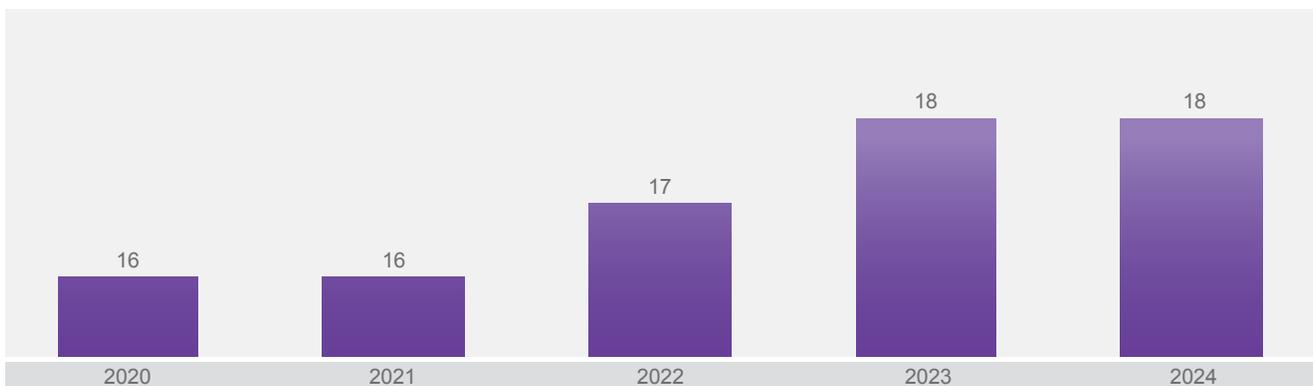
2020	2021	2022	2023	2024
16	16	17	18	18

1 Only includes messages sent nationally and internationally, excludes roaming.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 87. COSTA RICA: Total outgoing traffic from the national mobile telephone service[1] and its distribution by call destination, 2020-2024

(figures in millions of minutes and in percentage terms)

	2020	2021	2022	2023	2024
National outgoing voice	5,688	5,090	4,378	3,827	3,302
Landline telephony	18.8 %	18.9 %	18.2 %	20.8 %	22.6 %
A mobile offline	28.6 %	28.5 %	29.1 %	28.9 %	28.8 %
A mobile on net	52.6 %	52.6 %	52.7 %	50.3 %	48.6 %

■ A mobile on net ■ A mobile offline ■ Landline telephony — National outgoing voice
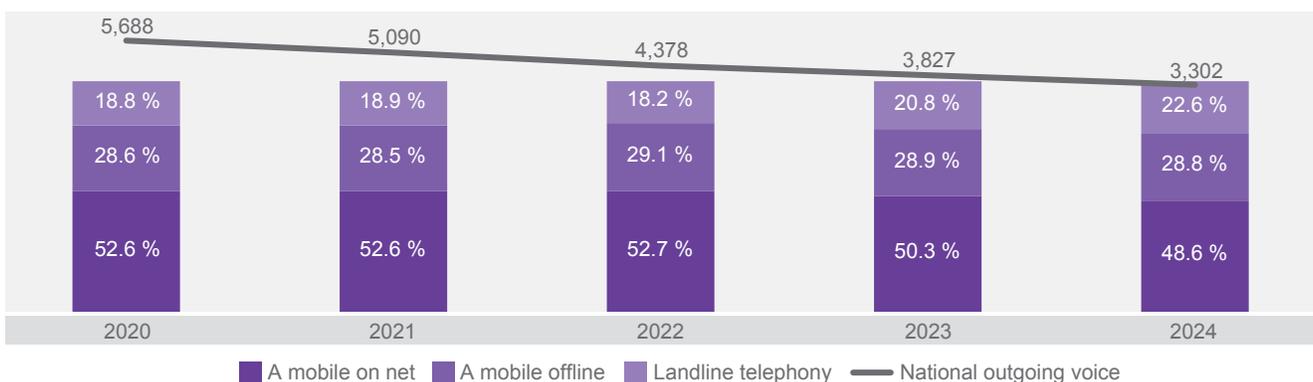
1 Includes domestic voice minutes only, excludes roaming.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 88. COSTA RICA: Total and percentage distribution of SMS domestic traffic, 2020-2024
(yearly figures in millions of messages and in percentage terms)

Year	2020	2021	2022	2023	2024
SMS total	1,410	1,369	1,404	1,441	1,500
SMS off net	49 %	56 %	61.9 %	69.2 %	76.1 %
SMS on net	51 %	44 %	38.1 %	30.8 %	23.9 %

Legend: SMS on net · SMS off net · SMS total
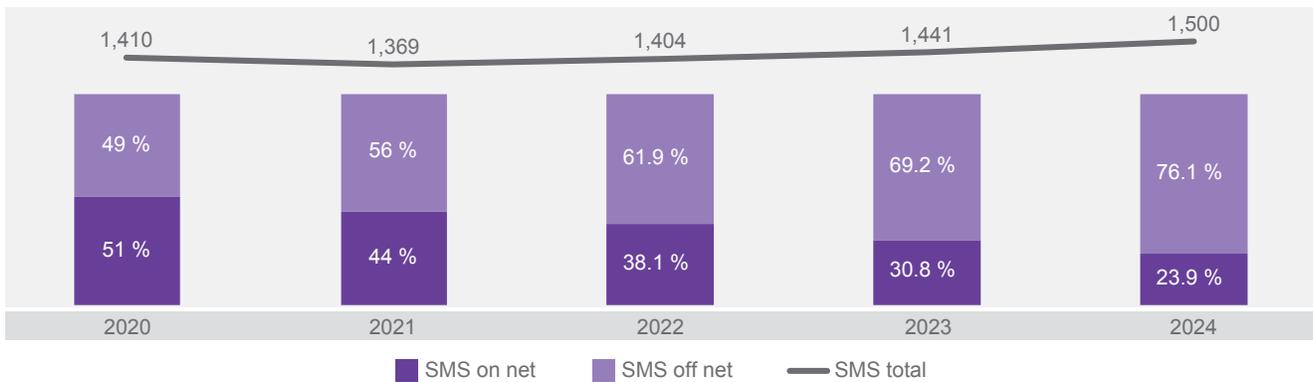
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 89. COSTA RICA: Total international traffic associated with mobile telephony, 2020-2024
(yearly figures in millions of minutes)

Year	2020	2021	2022	2023	2024
Total International	416	386	350	291	232
International departure	53.7 %	47.9 %	42.2 %	41.4 %	41.5 %
International entry	46.3 %	52.1 %	57.8 %	58.6 %	58.5 %

Legend: International entry · International departure · Total International

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 90. COSTA RICA: Total international SMS traffic sent, 2020-2024
(yearly figures in millions of messages)

Year	2020	2021	2022	2023	2024
	4	5	5	3	2
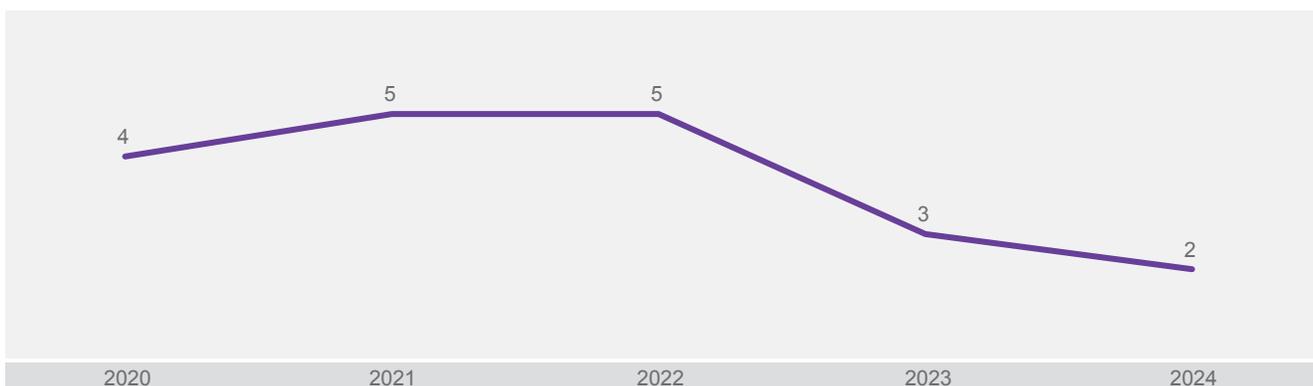
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 91. COSTA RICA: Distribution of total revenue associated with mobile telephony[1] by component, 2020-2024
(figures in millions of colones)

	2020	2021	2022	2023	2024
Mobile telephony	204,662	189,790	181,327	177,930	179,691
Messaging	5,827	5,669	5,801	3,332	3,348
Voice	198,835	184,121	175,526	174,598	176,342

Legend: ■ Voice ■ Messaging — Mobile telephony
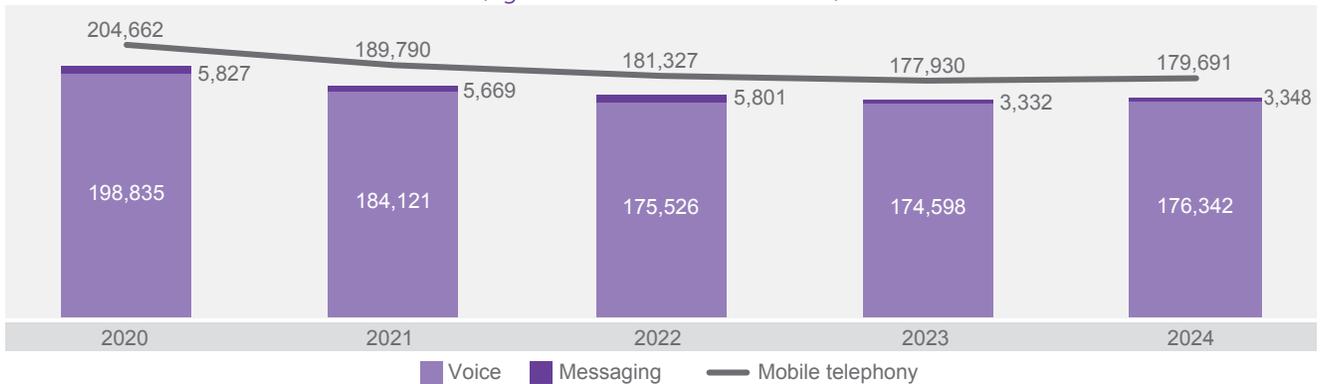
1 Includes national and international mobile telephony, excludes roaming and data.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 92. COSTA RICA: Distribution of total revenue associated with mobile telephony[1] by sub-service, 2020-2024
(figures in millions of colones)
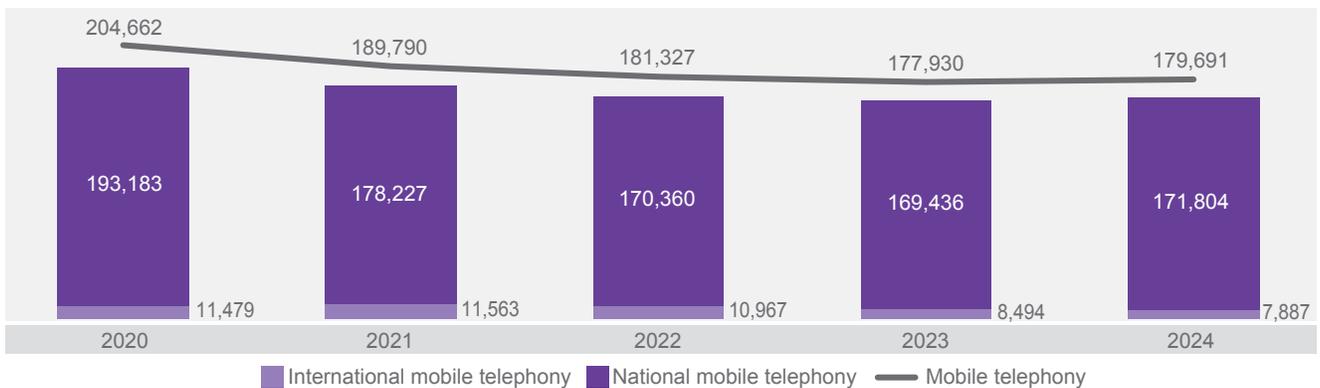
	2020	2021	2022	2023	2024
Mobile telephony	204,662	189,790	181,327	177,930	179,691
National mobile telephony	193,183	178,227	170,360	169,436	171,804
International mobile telephony	11,479	11,563	10,967	8,494	7,887

Legend: ■ International mobile telephony ■ National mobile telephony — Mobile telephony

1 Includes national and international mobile telephony, excludes roaming and data.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 93. COSTA RICA: Average monthly revenue per mobile telephony[1] subscriber (ARPU), by component, 2020-2024
(figures in colones)
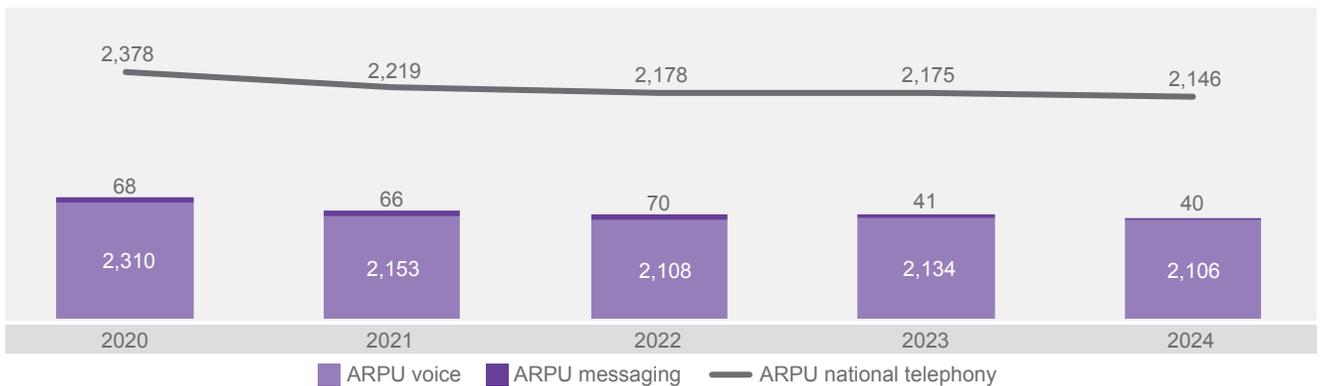
	2020	2021	2022	2023	2024
ARPU national telephony	2,378	2,219	2,178	2,175	2,146
ARPU messaging	68	66	70	41	40
ARPU voice	2,310	2,153	2,108	2,134	2,106

Legend: ■ ARPU voice ■ ARPU messaging — ARPU national telephony

1 Includes national and international mobile telephony, excludes roaming and data.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 94. COSTA RICA: Distribution of total revenue associated with mobile telephony[1] by payment method[1], 2020-2024
(yearly figures in percentage terms)
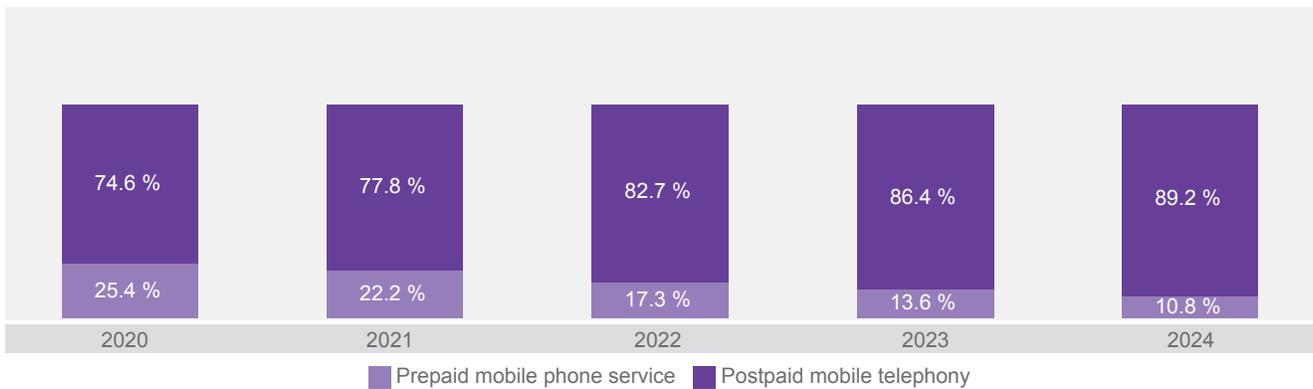
	2020	2021	2022	2023	2024
Postpaid mobile telephony	74.6 %	77.8 %	82.7 %	86.4 %	89.2 %
Prepaid mobile phone service	25.4 %	22.2 %	17.3 %	13.6 %	10.8 %

■ Prepaid mobile phone service ■ Postpaid mobile telephony

1 Includes national and international mobile telephony, excludes roaming and data.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 95. COSTA RICA: Total revenue from domestic mobile telephony[1] by component, 2020-2024
(yearly figures in millions of colones)

	2020	2021	2022	2023	2024
Mobile phone revenue	193,183	178,227	170,360	169,436	171,804
National Voice	187,818	173,243	165,113	166,431	168,772
National courier service	5,365	4,984	5,247	3,005	3,032

■ National Voice ■ National courier service — Mobile phone revenue
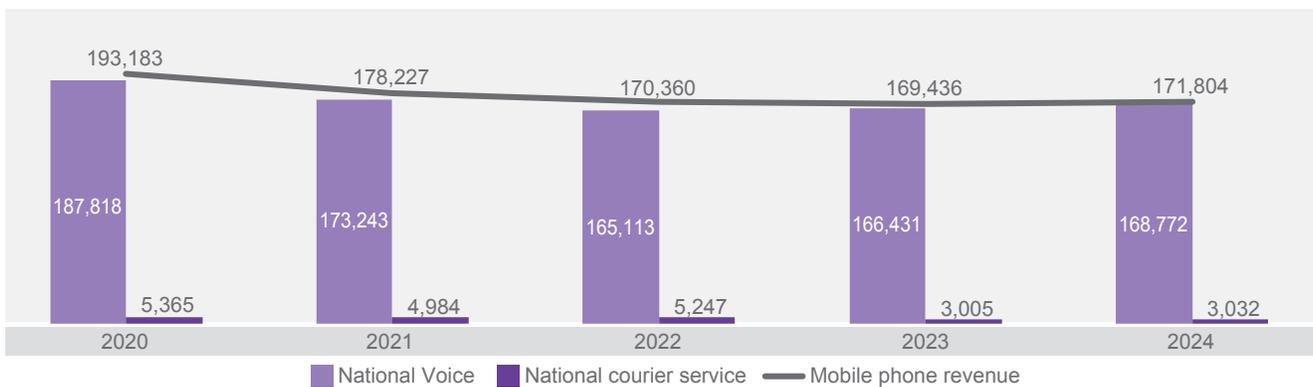
1 Includes national calls and national messages.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 96. COSTA RICA: Distribution of total voice revenue associated with domestic mobile telephony, 2020-2024
(yearly figures in millions of colones)

	2020	2021	2022	2023	2024
National Voice	187,818	173,243	165,113	166,431	168,772
Incoming voice	33,966	28,949	23,062	18,955	14,236
Outgoing national voice	153,851	144,294	142,051	147,476	154,536

■ Outgoing national voice ■ Incoming voice — National Voice
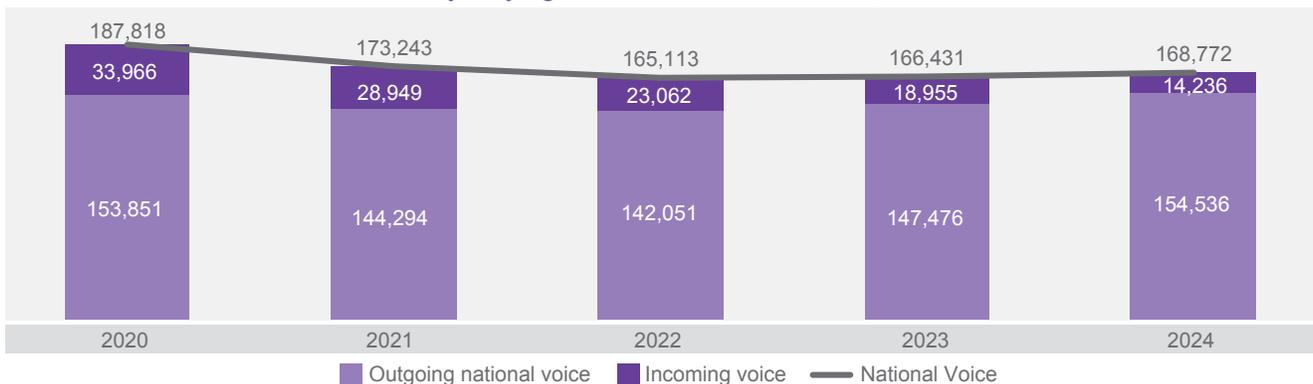
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 97. COSTA RICA: Total revenue from domestic outbound messaging, 2020-2024

(yearly figures in millions of colones)

Year	Value
2020	5,365
2021	4,984
2022	5,247
2023	3,005
2024	3,032
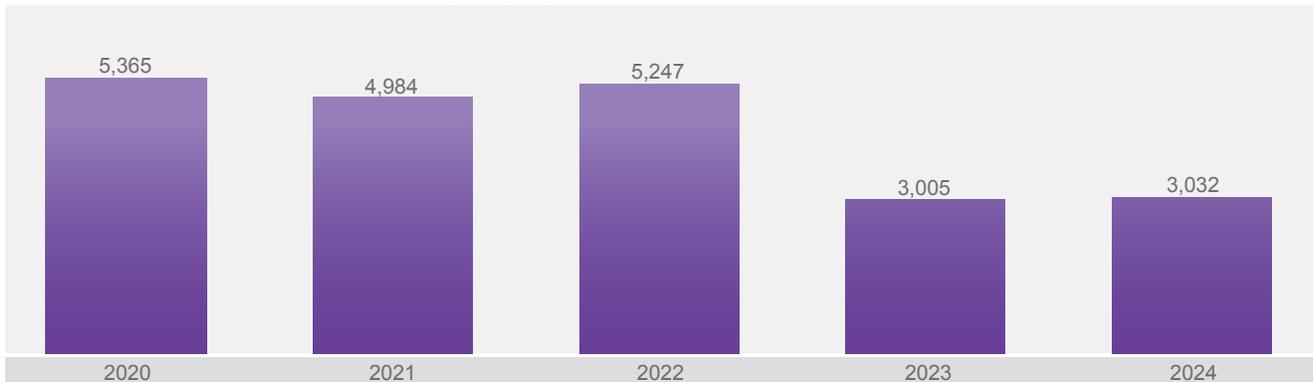
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 98. COSTA RICA: Total revenue from international mobile telephony per category in 2020-2024

(yearly figures in millions of colones and in percentage terms)

Year	International mobile telephony	International Voice	International courier service
2020	11,479	96 %	4 %
2021	11,563	94,1 %	5,9 %
2022	10,967	95 %	5 %
2023	8,494	96,1 %	3,9 %
2024	7,887	96 %	4 %
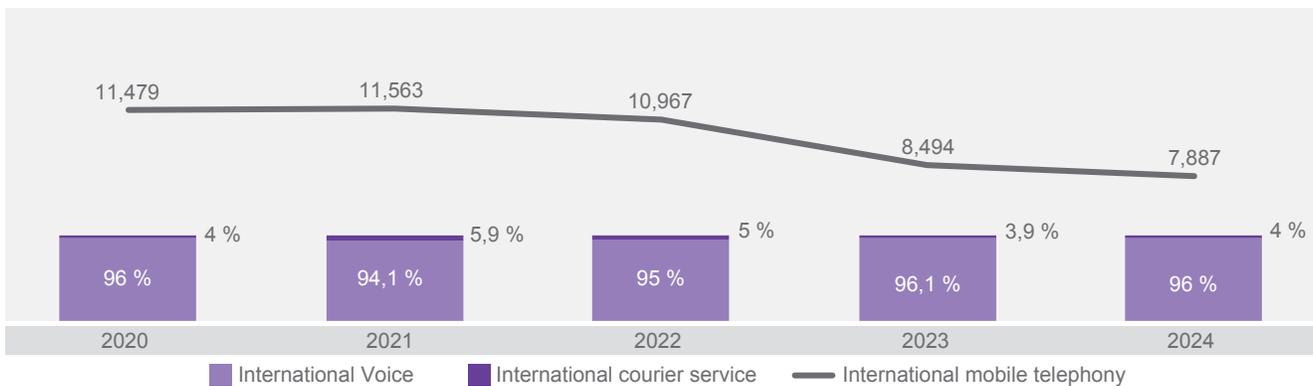
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 99. COSTA RICA: Distribution of total voice revenue associated with international mobile telephony, 2020-2024

(yearly figures in millions of colones)

Year	International Voice	Incoming international voice	Outgoing international voice
2020	11,017	4,505	6,513
2021	10,878	4,821	6,057
2022	10,414	4,887	5,526
2023	8,167	3,539	4,628
2024	7,571	3,149	4,422
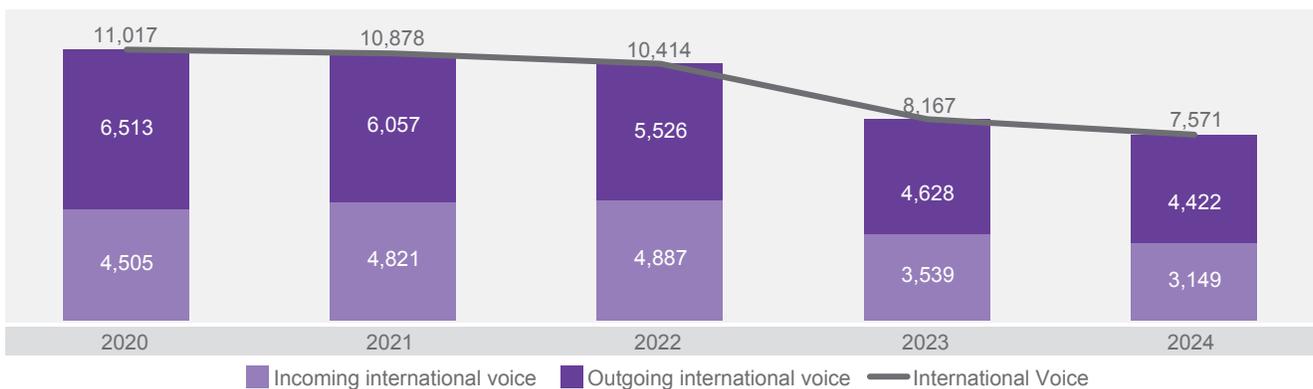
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 100. COSTA RICA: Percentage of total voice revenue associated with international mobile telephony per payment plan in 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Postpaid	39.7 %	43.1 %	48.4 %	51.1 %	54.9 %
Prepaid	60.3 %	56.9 %	51.6 %	48.9 %	45.1 %

■ Prepaid ■ Postpaid
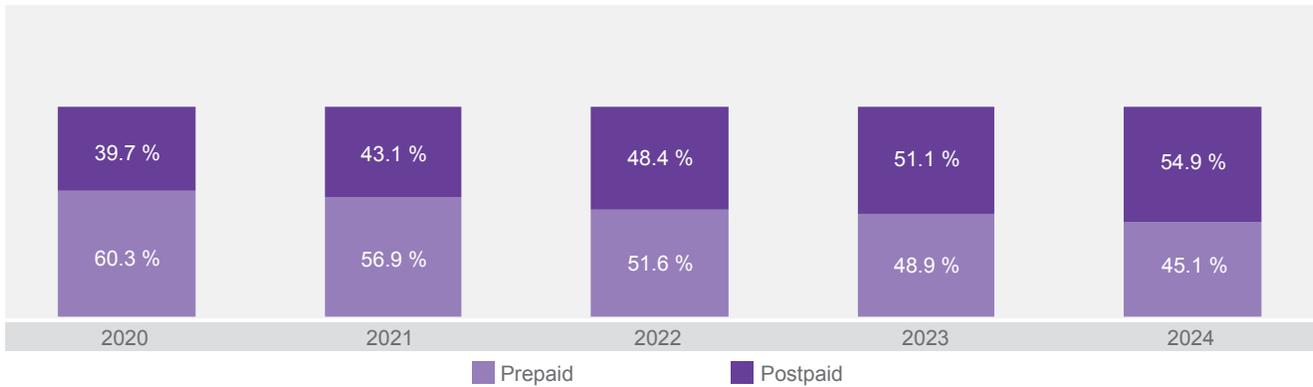
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 101. COSTA RICA: Total and percentage distribution of roaming voice call traffic, 2020-2024

(yearly figures in millions of minutes and in percentage terms)

	2020	2021	2022	2023	2024
Voice Roaming	34	39	45	42	49
Roaming voice out	11.9 %	11.5 %	12 %	9.6 %	11.7 %
Voice roaming in	88.1 %	88.5 %	88 %	90.4 %	88.3 %

■ Voice roaming in ■ Roaming voice out ▬ Voice Roaming
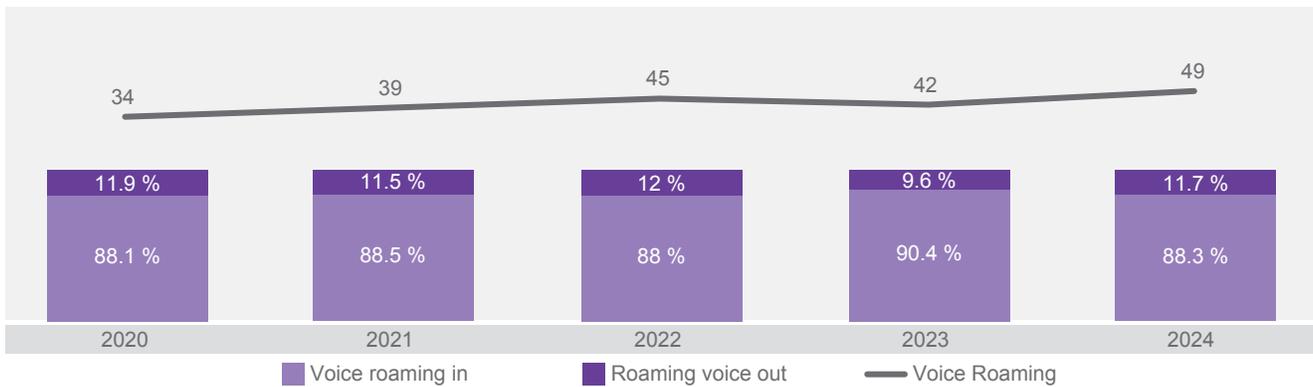
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 102. COSTA RICA: Total and percentage distribution of roaming SMS/MMS traffic, 2020-2024

(yearly figures in millions of messages and in percentage terms)

	2020	2021	2022	2023	2024
Roaming Messaging	9	15	23	22	34
Roaming SMS/MMS outgoing	19.9 %	27.3 %	36.4 %	36.9 %	49 %
Roaming SMS/MMS entry	80.1 %	72.7 %	63.6 %	63.1 %	51 %

■ Roaming SMS/MMS entry ■ Roaming SMS/MMS outgoing ▬ Roaming Messaging
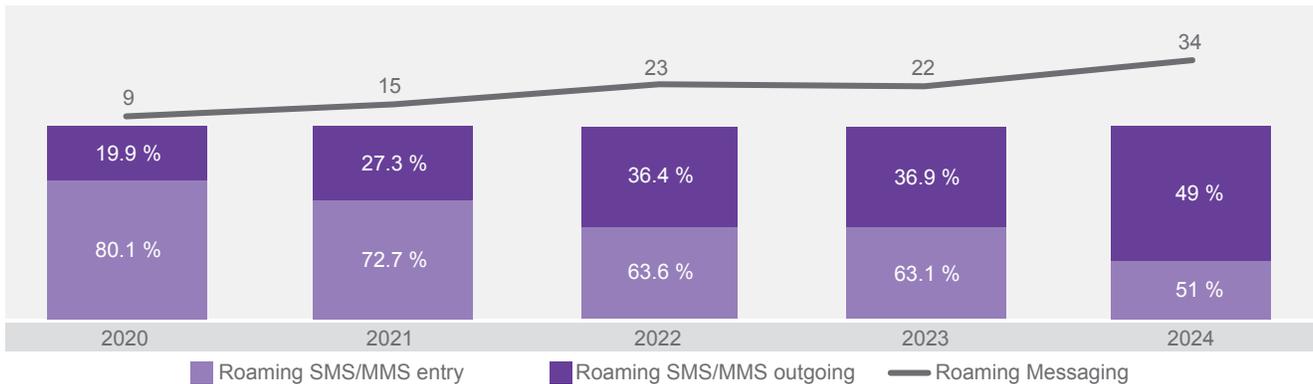
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 103. COSTA RICA: Total and percentage distribution of roaming data traffic, 2020-2024
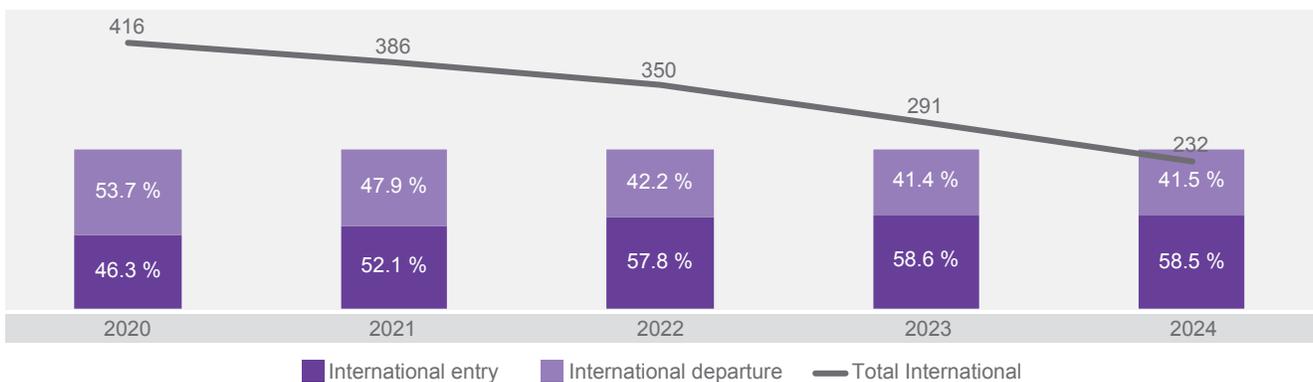
(yearly figures in TB and in percentage terms)

	2020	2021	2022	2023	2024
Data Roaming	801	1,891	3,336	5,268	7,389
Roaming data output	29.4 %	27.4 %	26.4 %	26.9 %	21.3 %
Roaming data entry	70.6 %	72.6 %	73.6 %	73.1 %	78.7 %

Roaming data entry ■ Roaming data output ── Data Roaming
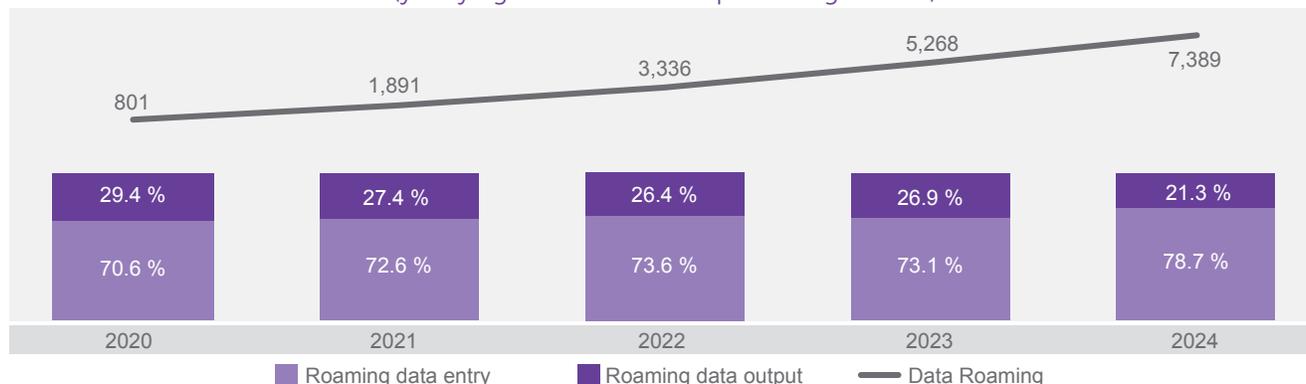
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 104. COSTA RICA: Total outgoing roaming revenue by component[1], 2020-2024

(yearly figures in millions of colones and in percentage terms)

	2020	2021	2022	2023	2024
Retail roaming (outbound roaming)	1,281	1,670	2,831	2,874	2,596
Messaging	16.6 %	13.6 %	12.5 %	8.8 %	5.6 %
Data	36.8 %	55.9 %	67.8 %	74.5 %	78.6 %
Voice	46.6 %	30.5 %	19.7 %	16.7 %	15.8 %

Voice ■ Data ■ Messaging ── Retail roaming (outbound roaming)
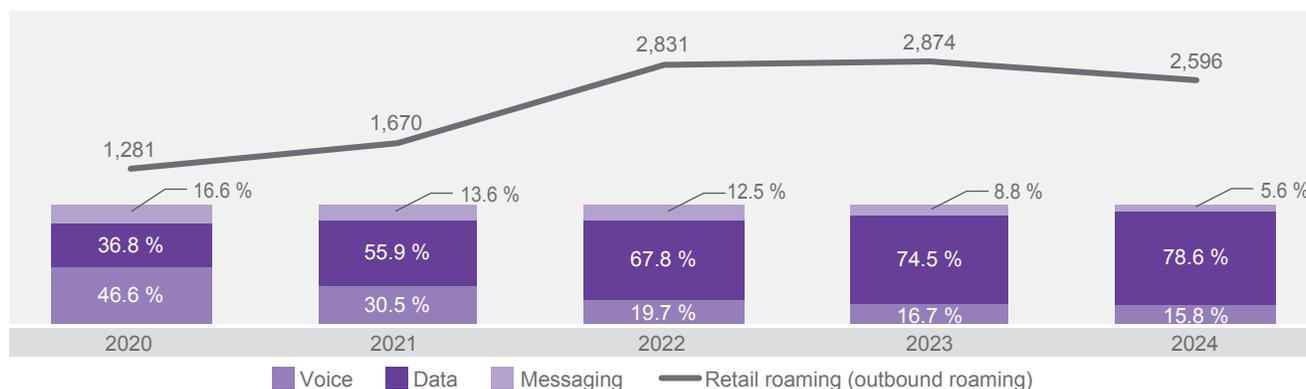
1 Retail roaming revenue refers to events carried out by domestic subscribers abroad (outbound roaming).
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 105. COSTA RICA: Total revenue from outbound roaming voice calls, 2020-2024
(yearly figures in millions of colones)

2020	2021	2022	2023	2024
596	510	557	479	411
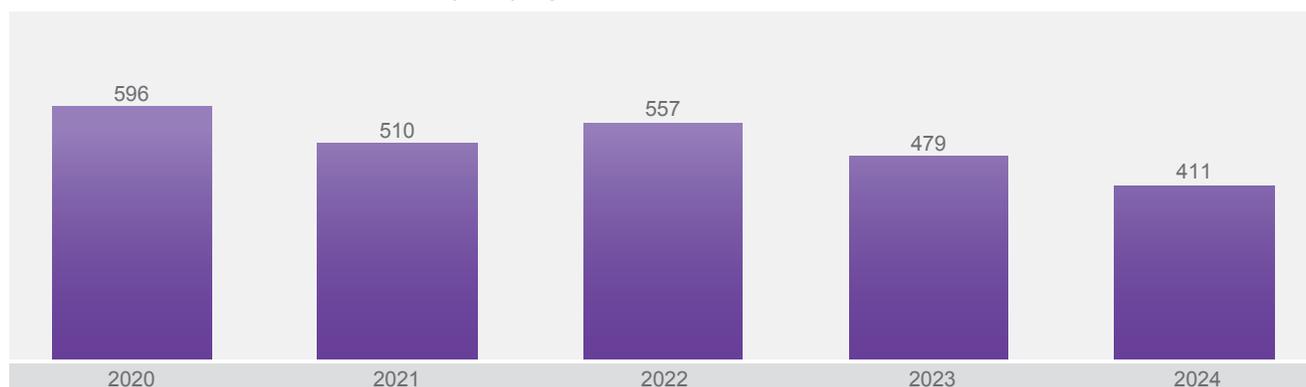
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 106. COSTA RICA: Total revenue from outbound roaming data, 2020-2024

(yearly figures in millions of colones)

Year	Value
2020	472
2021	934
2022	1,921
2023	2,143
2024	2,041
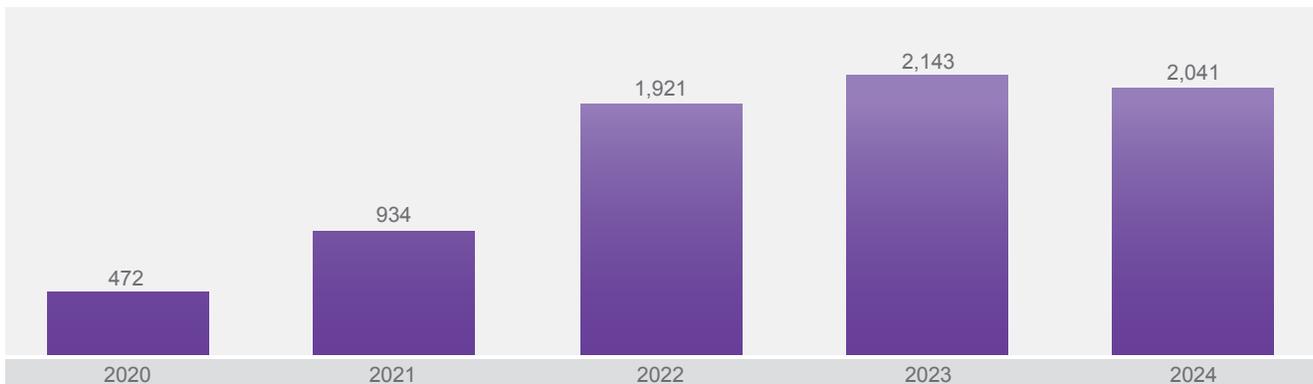
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 107. COSTA RICA: Total revenue from outbound roaming messaging, ç2020-2024

(yearly figures in millions of colones)

Year	Value
2020	212
2021	226
2022	353
2023	252
2024	145
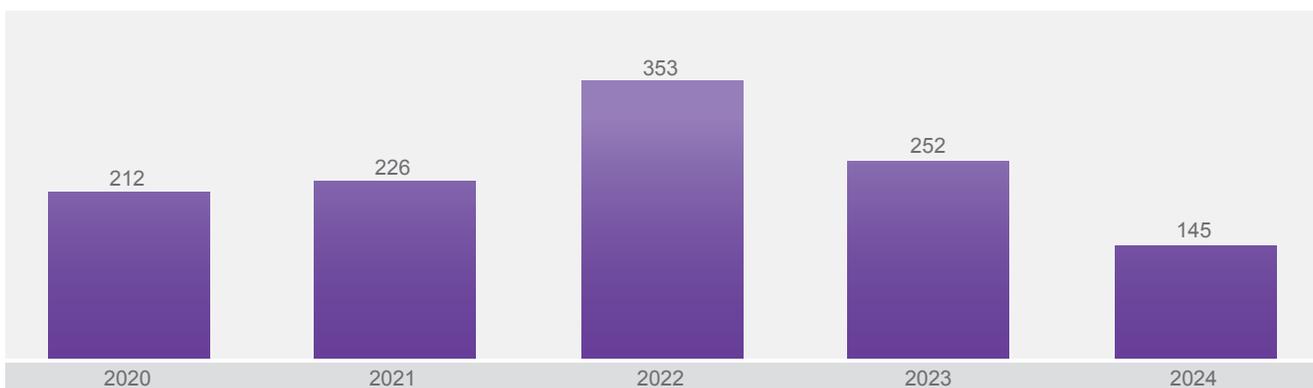
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 108. COSTA RICA: Mobile Internet subscriptions, 2020-2024

(yearly figures)

Year	Value
2020	4,736,699
2021	4,904,938
2022	5,001,945
2023	5,183,454
2024	5,315,598
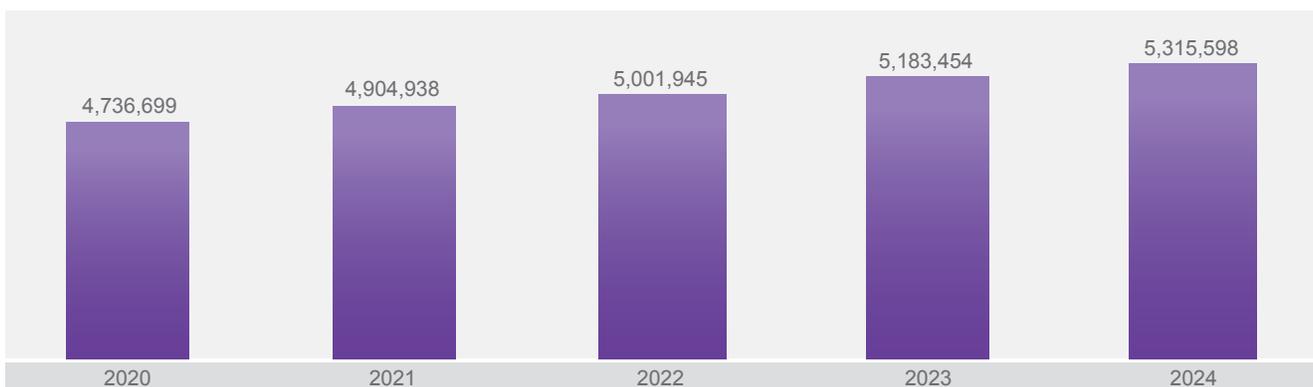
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 109. COSTA RICA: Mobile Internet subscriptions, by payment method and access device, 2020-2024
(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Datacard/USB	2.8 %	2.6 %	2.6 %	2.6 %	2.6 %
Prepaid	45.2 %	44.1 %	42.3 %	41. %	38.7 %
Postpaid	52. %	53.3 %	55.1 %	56.4 %	58.7 %

Legend: Postpaid, Prepaid, Datacard/USB
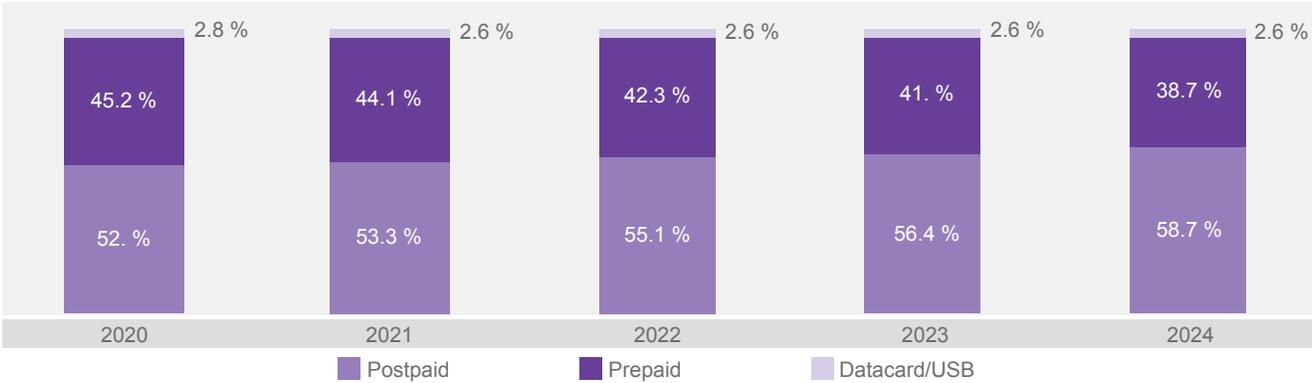
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 110. COSTA RICA: Mobile Internet subscriptions, data cards, percentage distribution by operator, 2024
(yearly figures in percentage terms)

	Datacard	Prepaid	Postpaid	Total
Liberty	6.3 %	39.4 %	32.5 %	34.5 %
Kölbi	84. %	39.5 %	42.2 %	42.2 %
Claro	9.7 %	21.1 %	25.3 %	23.3 %

Legend: Claro, Kölbi, Liberty
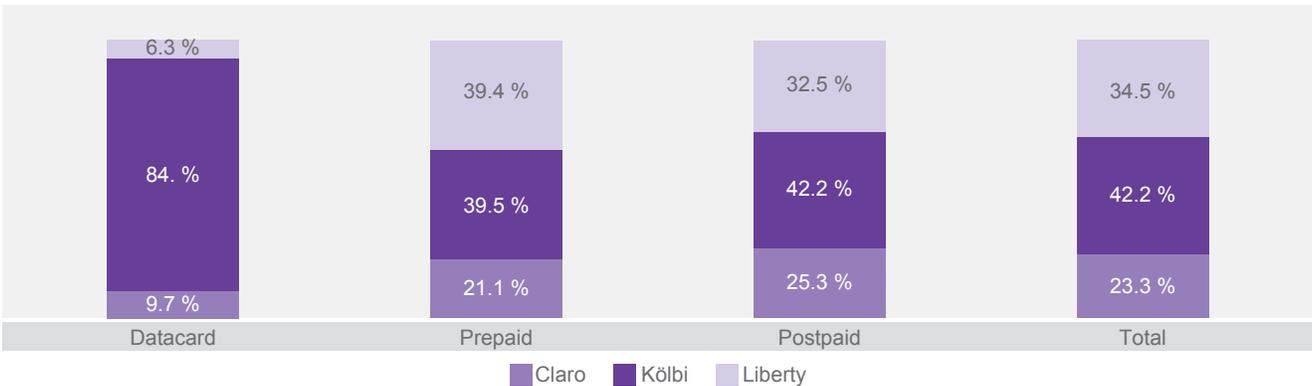
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 111. COSTA RICA: Evolution of the mobile Internet HHI, 2020-2024
(year-end figures)

2020	2021	2022	2023	2024
3,759	3,687	3,631	3,584	3,516

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 112. COSTA RICA: Mobile Internet subscriptions, percentage distribution by speed, postpaid category, 2023-2024

(year-end figures in percentage terms)

2023	2024
43.8 %	47.6 %
2.6 %	2.4 %
45.3 %	42 %
8.3 %	8. %

- V <= 2 Mbps
- 2 Mbps < V <= 5 Mbps
- 5 Mbps < V <= 8 Mbps
- 8 Mbps < V <= 15 Mbps
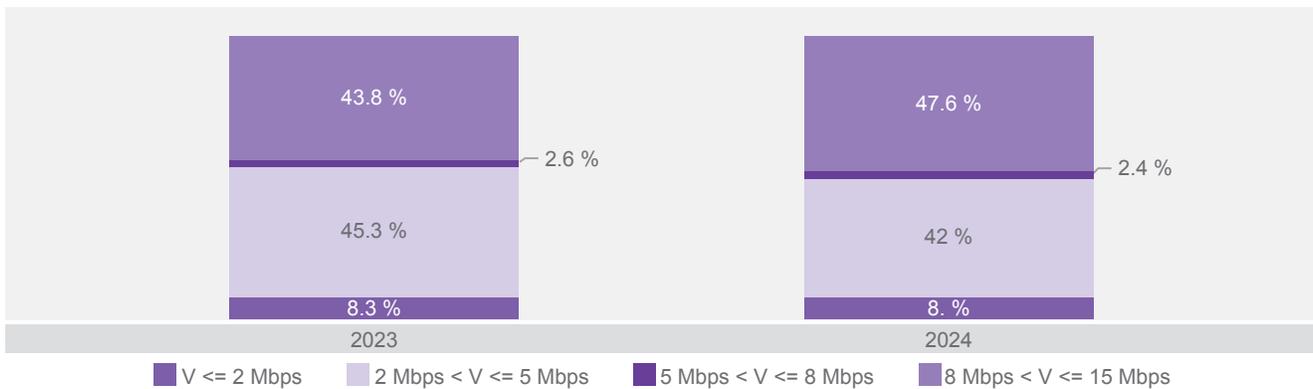
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 113. COSTA RICA: Mobile Internet subscriptions, percentage distribution by speed, prepaid category, 2023-2024

(year-end figures in percentage terms)

2023	2024
39.7 %	39.4 %
60.3 %	60.6 %

- 5 Mbps < V <= 8 Mbps
- 8 Mbps < V <= 15 Mbps
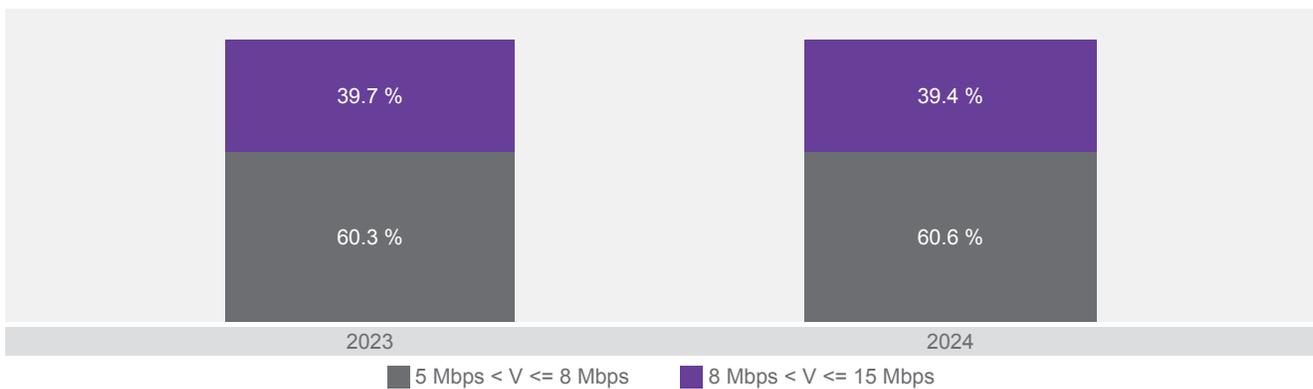
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 114. COSTA RICA: Mobile Internet subscriptions, percentage distribution by speed, data card, 2023-2024

(year-end figures in percentage terms)

2023	2024
7.8 %	8.1 %
82.8 %	82.7 %
3.1 %	2.7 %
6.3 %	6.5 %

- V <= 2 Mbps
- 2 Mbps < V <= 5 Mbps
- 5 Mbps < V <= 8 Mbps
- 8 Mbps < V <= 15 Mbps
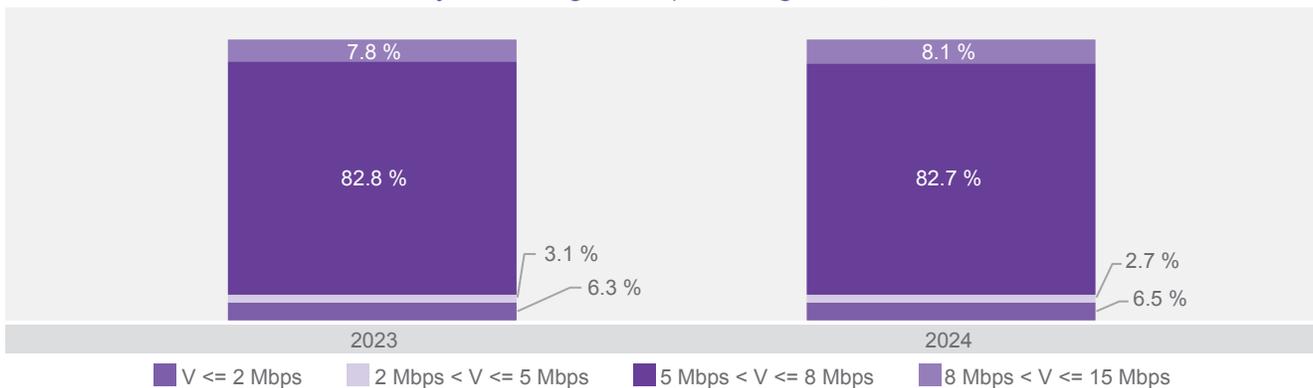
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 115. COSTA RICA: Number of mobile Internet subscriptions per every fixed Internet subscription, 2020-2024

(year-end figures)

2020	2021	2022	2023	2024
4.8	4.6	4.5	4.5	4.6
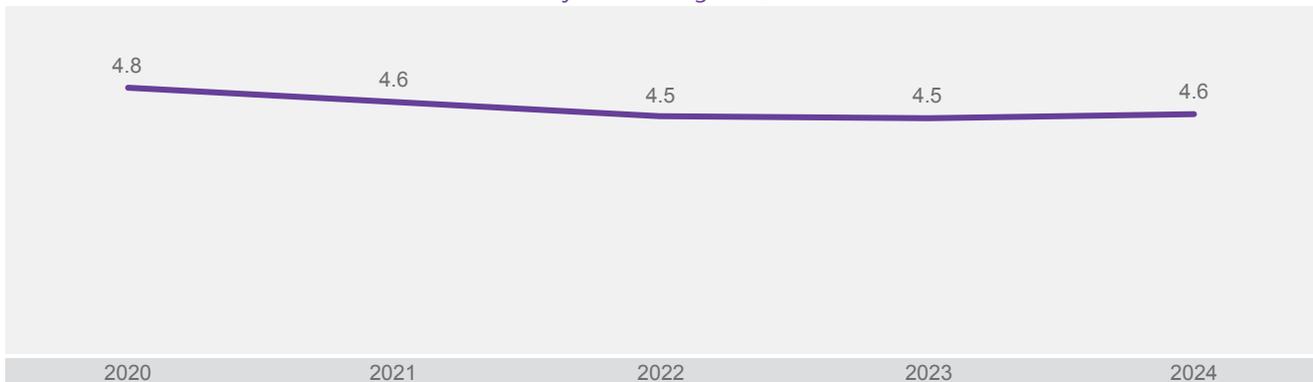
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 116. COSTA RICA: Mobile Internet subscriptions per 100 inhabitants, 2020-2024

(year-end figures)

2020	2021	2022	2023	2024
92.7 %	95 %	95.9 %	98.5 %	100.5 %
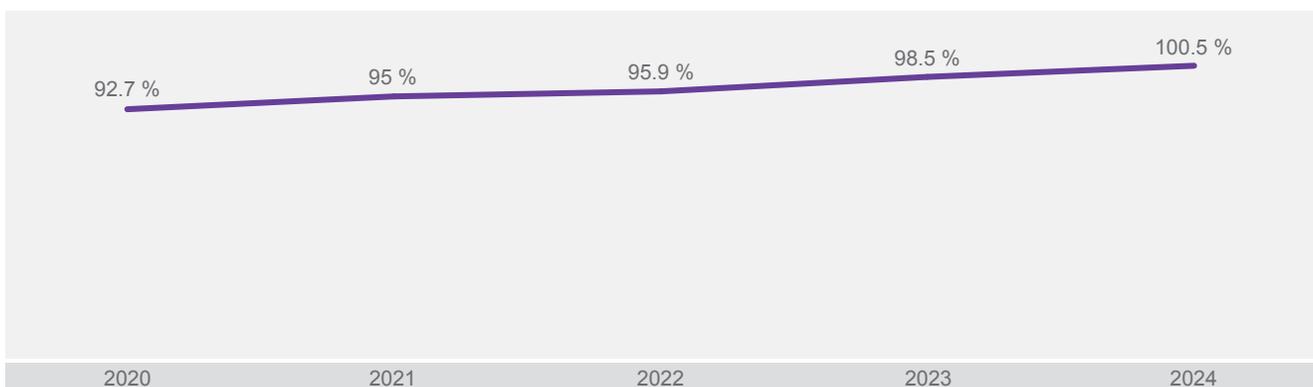
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 117. COSTA RICA: Mobile Internet traffic, 2020-2024

(yearly figures in TB)

2020	2021	2022	2023	2024
222,810	269,157	332,661	416,442	477,399
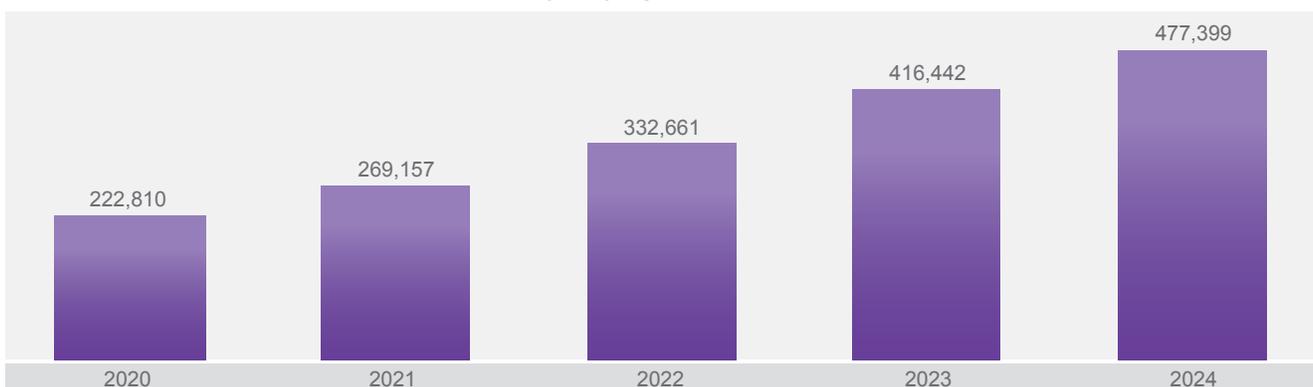
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 118. COSTA RICA: Mobile Internet traffic per payment plan and device, 2023-2024
(yearly figures in TB)

Postpaid	Prepaid	Datacard/USB
360,948 (2023) / 411,354 (2024)	40,310 (2023) / 51,589 (2024)	15,184 (2023) / 14,456 (2024)

Legend: 2023, 2024
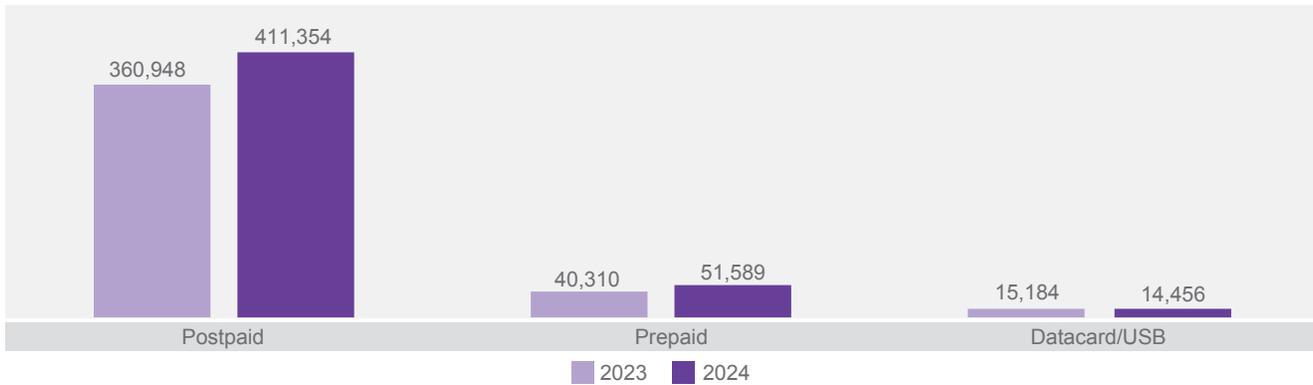
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 119. COSTA RICA: Internet traffic on the mobile network, percentage distribution by payment method and access device, 2024
(figures in TB)

2024:
- 3 % (Datacard/USB)
- 10.8 % (Prepaid)
- 86.2 % (Postpaid)

Legend: Postpaid, Prepaid, Datacard/USB
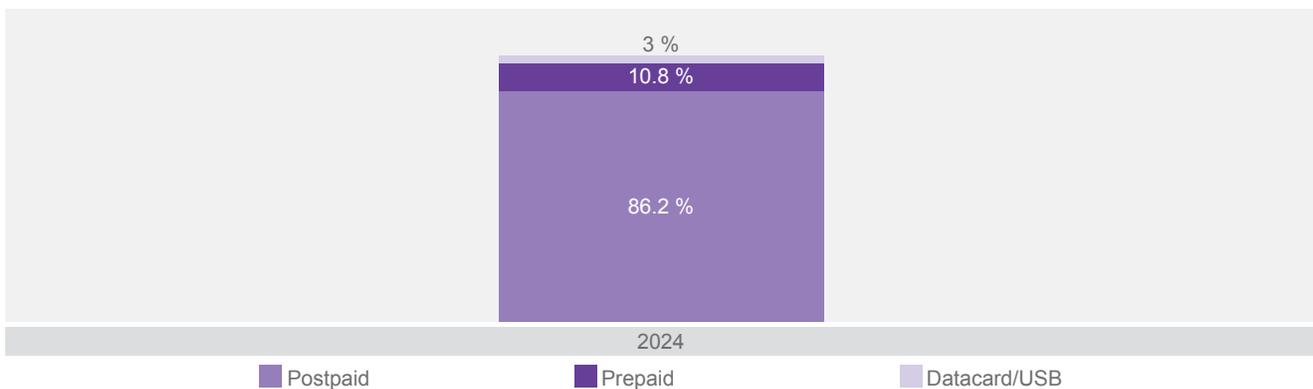
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 120. COSTA RICA: Internet traffic on the mobile network, average traffic per user for each payment method and on data cards, 2020-2024
(figures in GB per user per month)

	Postpaid	Prepaid	Datacard
2020	6.9	0.7	4.1
2021	7.5	1.1	7.7
2022	8.6	1.7	9.5
2023	10.5	1.6	9.6
2024	11.3	2.1	8.9
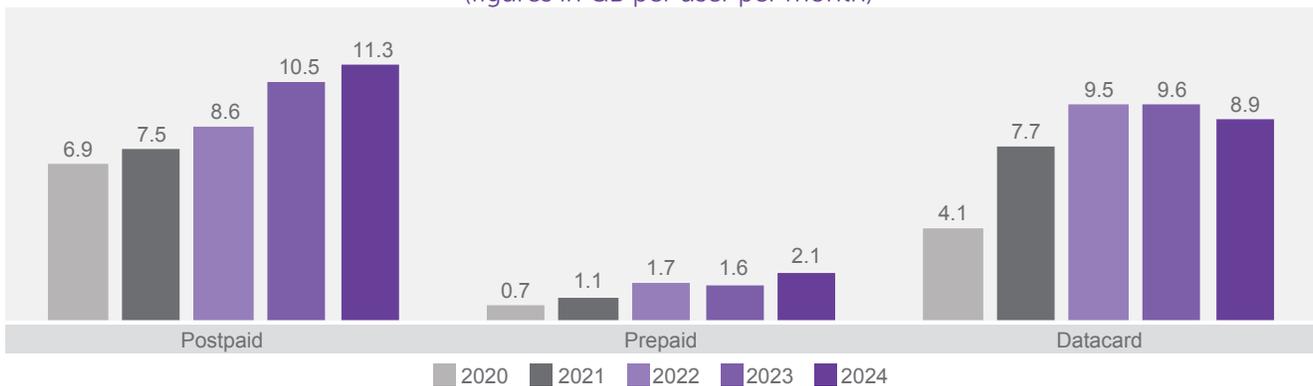
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 121. COSTA RICA: Traffic, mobile Internet access, postpaid, percentage distribution by speed, 2023-2024

(figures in percentage terms)

	2 Mbps < V <= 5 Mbps	5 Mbps < V <= 8 Mbps	8 Mbps < V <= 15 Mbps
2023	9.9 %	46.3 %	43.8 %
2024	9.4 %	44.4 %	46.1 %
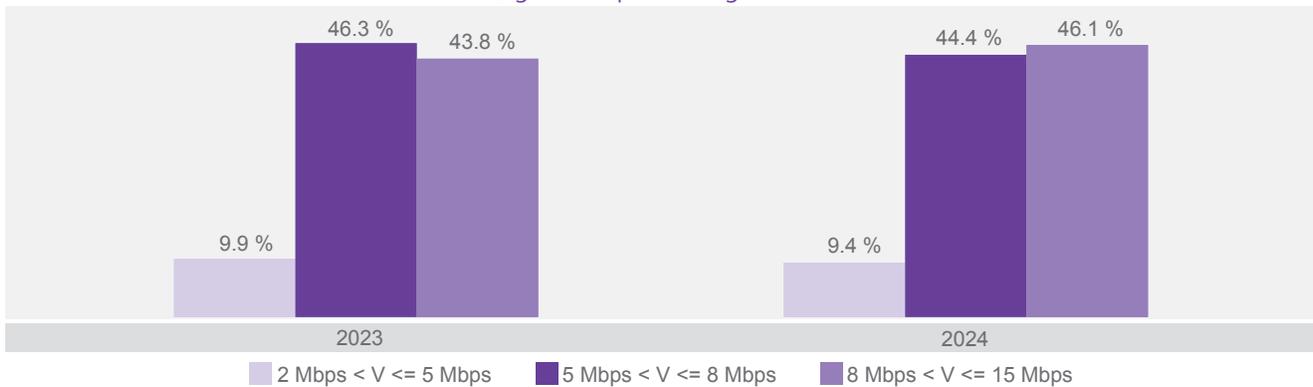
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 122. COSTA RICA: Traffic, mobile Internet access, prepaid, percentage distribution by speed, 2023-2024

(figures in percentage terms)

	5 Mbps < V <= 8 Mbps	8 Mbps < V <= 15 Mbps
2023	60.1 %	39.9 %
2024	38.3 %	61.7 %
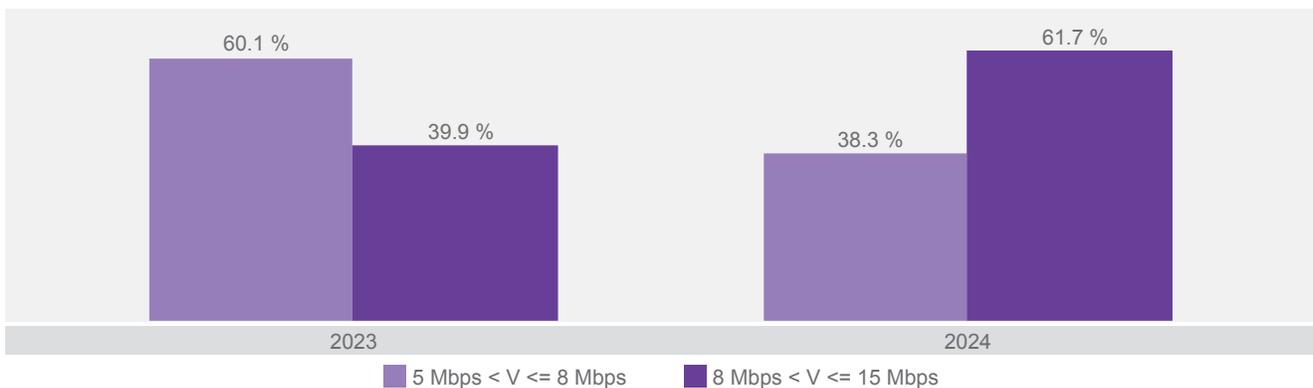
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 123. COSTA RICA: Traffic, mobile Internet access, data card, percentage distribution by speed, 2023-2024

(figures in percentage terms)

	V <= 2 Mbps	2 Mbps < V <= 5 Mbps	5 Mbps < V <= 8 Mbps	8 Mbps < V <= 15 Mbps
2023	7 %	26.8 %	24 %	42.2 %
2024	6.5 %	25 %	24 %	44.5 %
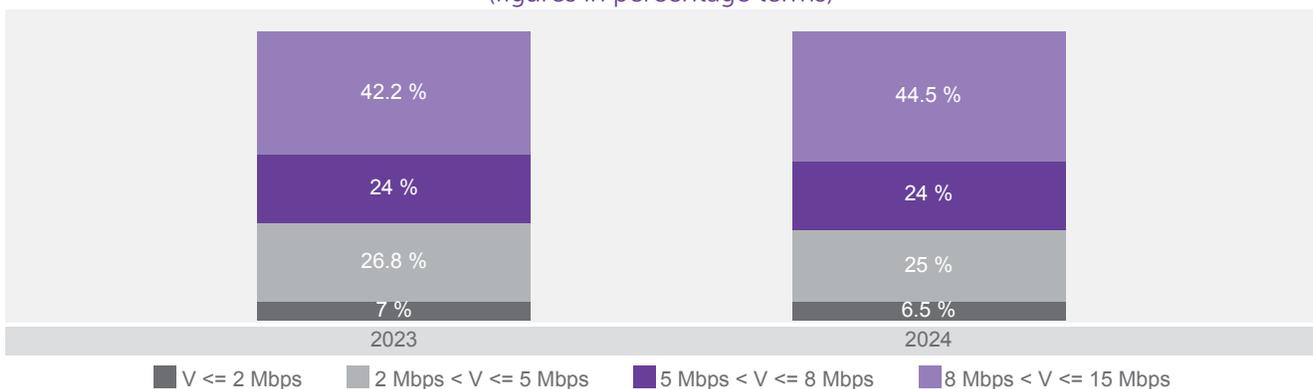
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 124. COSTA RICA: Mobile Internet revenue, 2020-2024
(yearly figures in millions of colones)

2020	2021	2022	2023	2024
255,358	254,740	261,815	279,377	307,494
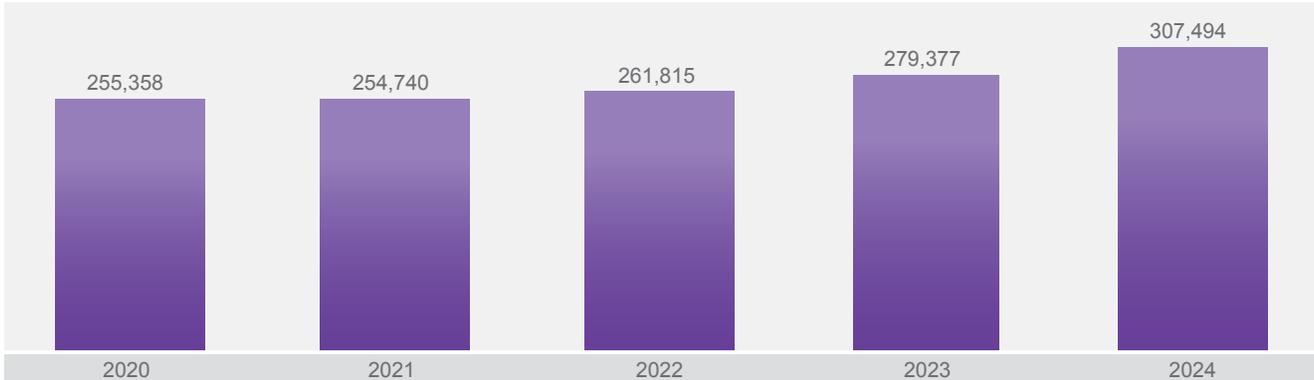
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 125. COSTA RICA: Mobile Internet revenue by payment method and device, 2020-2024
(yearly figures in millions of colones and in percentage terms)

	2020	2021	2022	2023	2024
Total	255,358	254,740	261,815	279,377	307,494
Datacard/USB	4.1 %	3.9 %	3.9 %	3.5 %	3.1 %
Prepaid	20.4 %	18.9 %	18.9 %	17.3 %	15.3 %
Postpaid	75.5 %	77.2 %	77.2 %	79.2 %	81.6 %

Postpaid   Prepaid   Datacard/USB   Total
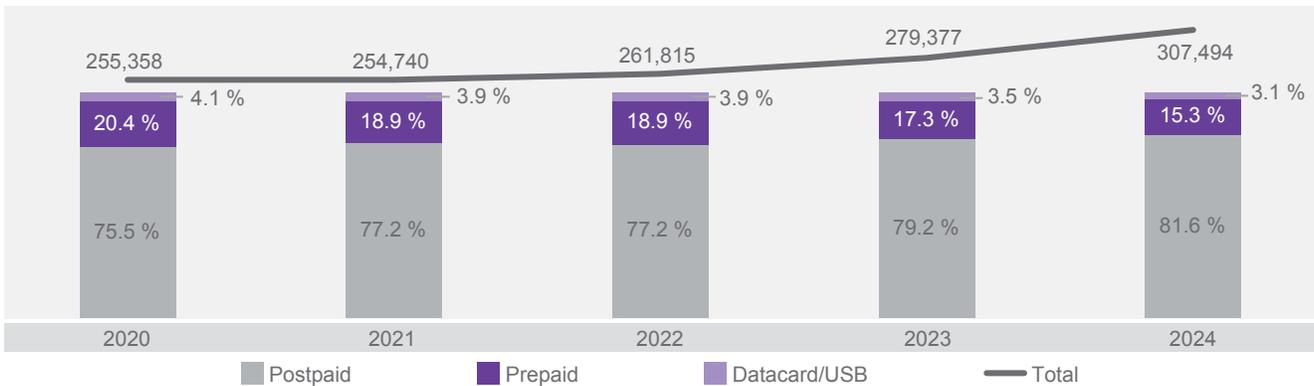
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 126. COSTA RICA: Mobile Internet revenue, postpaid, percentage distribution by speed, 2023-2024
(yearly figures in percentage terms)

	2023	2024
8 Mbps < V <= 15 Mbps	37.4 %	48.2 %
5 Mbps < V <= 8 Mbps	2.9 %	2.5 %
2 Mbps < V <= 5 Mbps	55.4 %	45.8 %
V <= 2 Mbps	4.3 %	3.5 %

V <= 2 Mbps   2 Mbps < V <= 5 Mbps   5 Mbps < V <= 8 Mbps   8 Mbps < V <= 15 Mbps
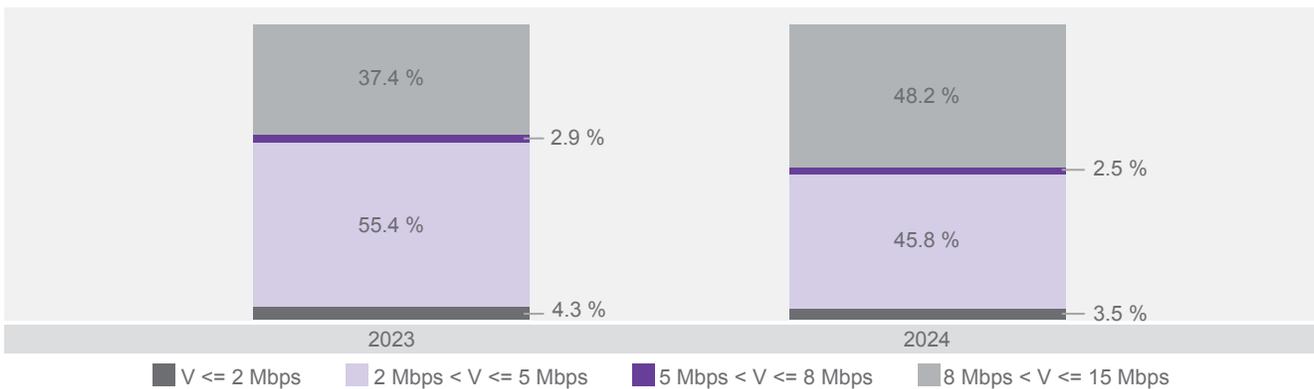
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 127. COSTA RICA: Mobile Internet revenue, prepaid, percentage distribution by speed, 2023-2024

(yearly figures in percentage terms)

	2023	2024
8 Mbps < V <= 15 Mbps	44.9 %	46 %
5 Mbps < V <= 8 Mbps	55.1 %	54 %

■ 5 Mbps < V <= 8 Mbps   ■ 8 Mbps < V <= 15 Mbps
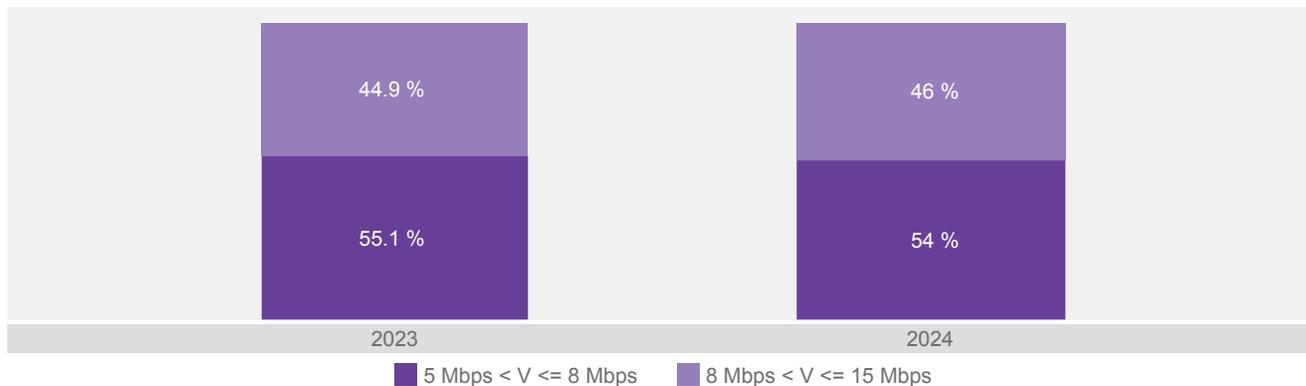
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 128. COSTA RICA: Mobile Internet revenue, data card, percentage distribution by speed, 2023-2024

(yearly figures in percentage terms)

2023: 11.9 %, 75.1 %, 7.1 %, 5.9 %
2024: 12.5 %, 74.4 %, 6.8 %, 6.3 %

■ V <= 2 Mbps   ■ 2 Mbps < V <= 5 Mbps   ■ 5 Mbps < V <= 8 Mbps   ■ 8 Mbps < V <= 15 Mbps
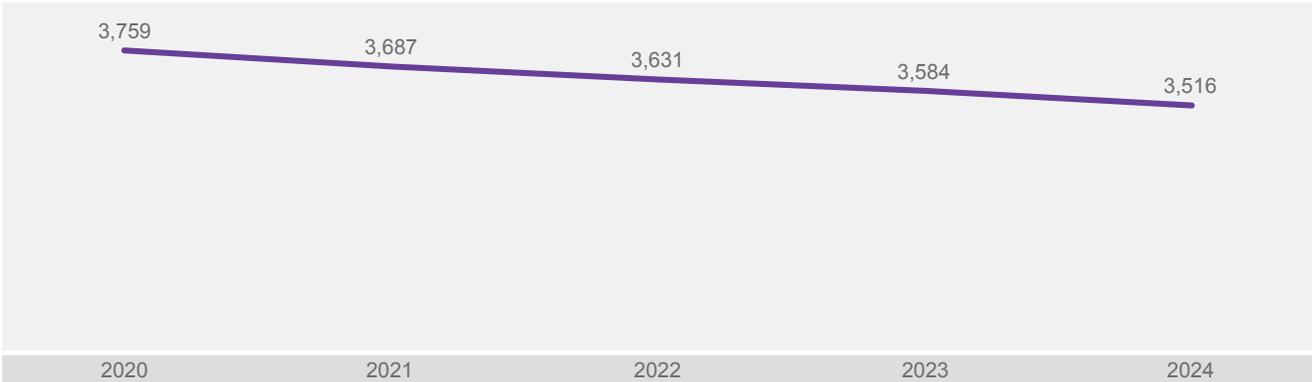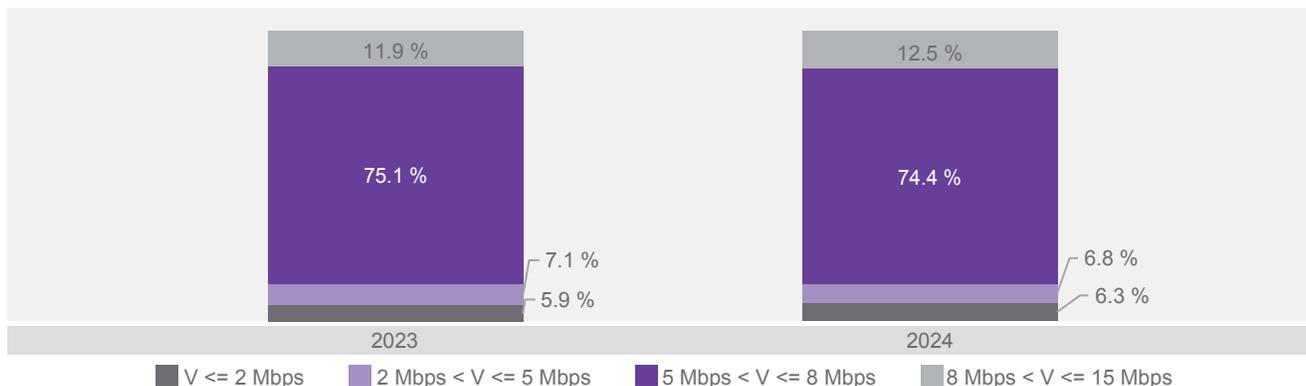
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 129. COSTA RICA: Internet revenue in the mobile network, average revenue per user for each payment method and datacard, 2020-2024

(monthly figures in colones per subscriber)

	2020	2021	2022	2023	2024
Postpaid	6,527	6,268	6,108	6,045	6,706
Datacard/USB	6,603	6,459	6,633	6,307	5,760
Prepaid	2,026	1,855	1,952	1,896	1,902

—— Postpaid   ••• Prepaid   — — Datacard/USB
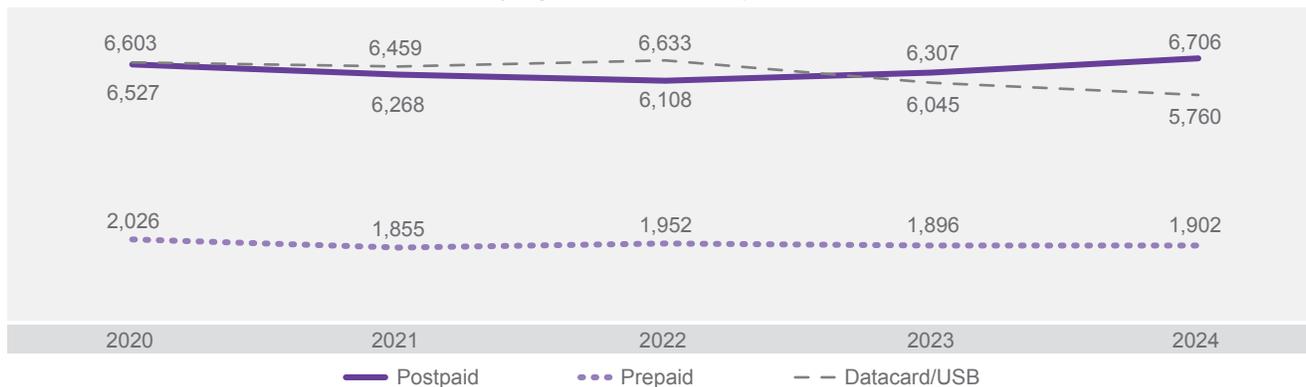
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 130. COSTA RICA: Distribution of total revenue associated with mobile telecommunications by service[1,2], 2020-2024

(yearly figures in millions of colones and in percentage terms)
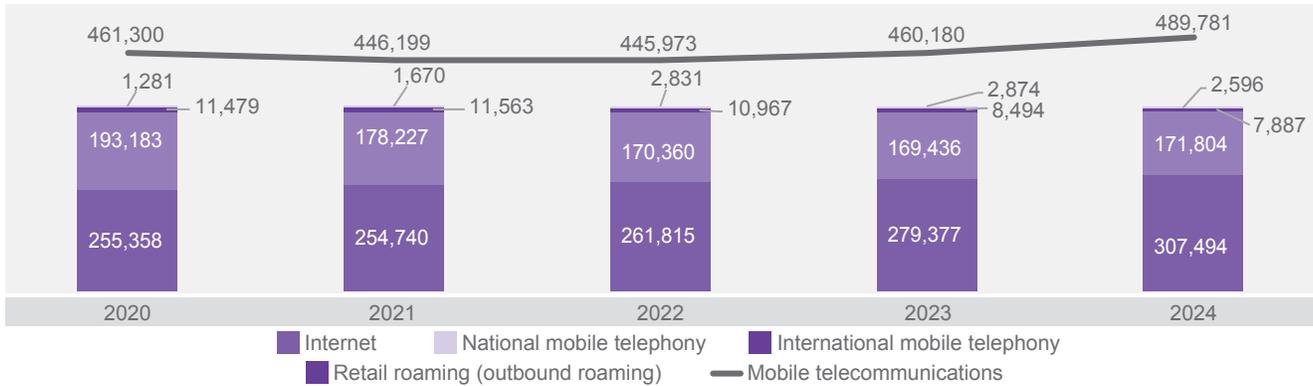
	2020	2021	2022	2023	2024
Mobile telecommunications	461,300	446,199	445,973	460,180	489,781
Retail roaming (outbound roaming)	1,281	1,670	2,831	2,874	2,596
International mobile telephony	11,479	11,563	10,967	8,494	7,887
National mobile telephony	193,183	178,227	170,360	169,436	171,804
Internet	255,358	254,740	261,815	279,377	307,494

Legend: Internet · National mobile telephony · International mobile telephony · Retail roaming (outbound roaming) · Mobile telecommunications

1 Includes national and international mobile telephony, roaming, and data.
2 From 2023 onwards, roaming revenue is added in order to comply with the data breakdown indicated by the International Telecommunication Union.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 131. COSTA RICA: Distribution of total revenue associated with mobile telecommunications[1,2] by payment method, 2020-2024

(yearly figures in millions of colones)
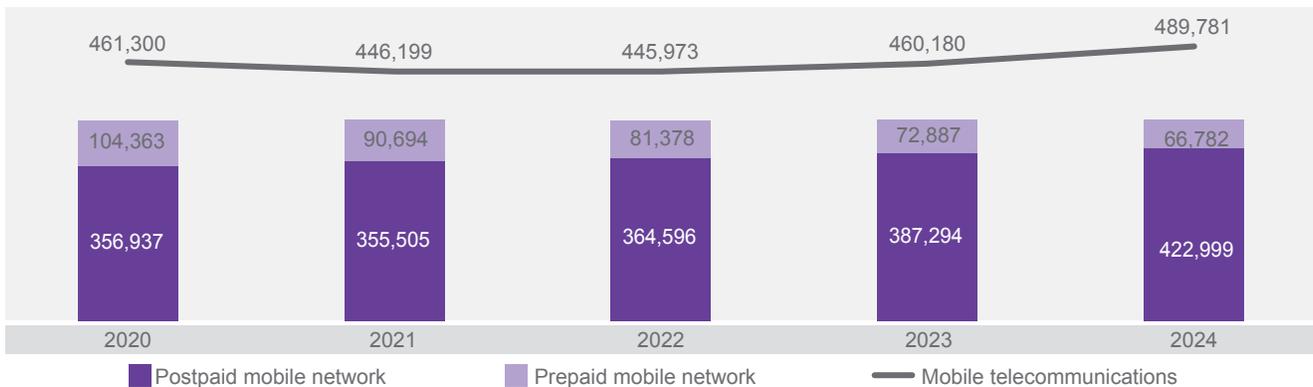
	2020	2021	2022	2023	2024
Mobile telecommunications	461,300	446,199	445,973	460,180	489,781
Prepaid mobile network	104,363	90,694	81,378	72,887	66,782
Postpaid mobile network	356,937	355,505	364,596	387,294	422,999

Legend: Postpaid mobile network · Prepaid mobile network · Mobile telecommunications

1 Includes national and international mobile telephony, roaming, and data.
2 From 2023 onwards, roaming revenue is added in order to comply with the data breakdown indicated by the International Telecommunication Union.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 132. COSTA RICA: Average monthly revenue per subscriber[1,2] (ARPU) for mobile telecommunications by payment method, 2020-2024
(figures in colones per month)

ARPU mobile network	ARPU prepaid monthly	ARPU postpaid monthly
5,359 / 5,217 / 5,357 / 5,625 / 5,849	1,864 / 1,705 / 1,723 / 1,672 / 1,576	11,867 / 10,993 / 10,119 / 10,136 / 10,229

■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024
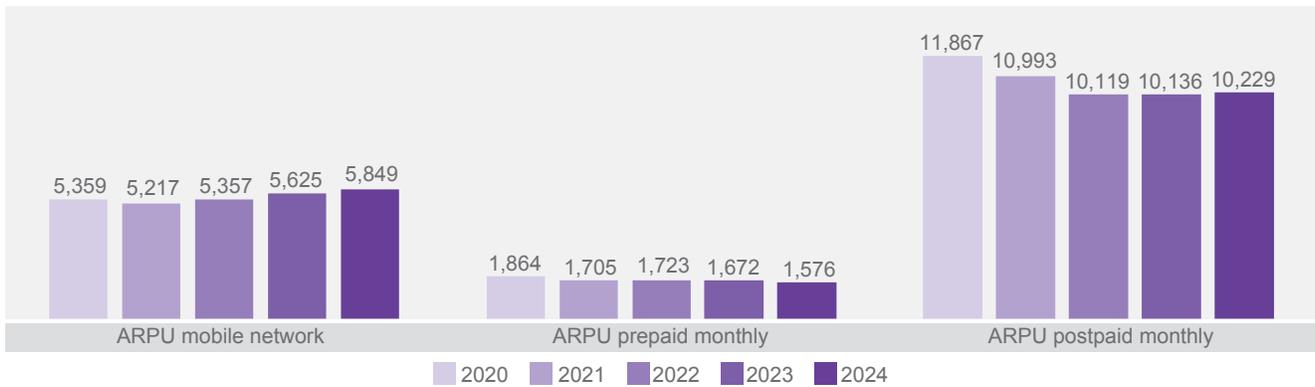
1 Average revenue per subscriber (ARPU) includes revenue from outgoing and incoming mobile voice calls at the national and international level, national and international SMS/MMS, outgoing roaming, and mobile data.
2 From 2023 onwards, roaming revenue is added in order to comply with the data breakdown indicated by the International Telecommunication Union.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 133. COSTA RICA: Successful yearly telephone number ports[1], 2020-2024
(yearly figures)

2020	2021	2022	2023	2024
454,429	450,960	434,015	350,213	260,762
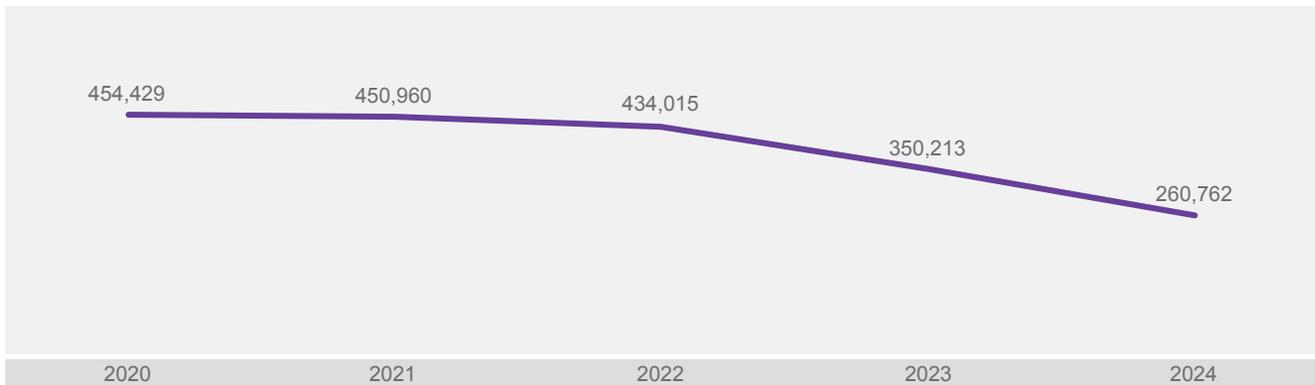
1 Successful ports: Number of telephone number ports that were successfully activated on a different operator's network.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 134. COSTA RICA: Net number of ports[1,2] per operator, December 2013 - December 2024
(aggregate figures)

ICE	Fullmóvil	Tuyo Móvil	Claro	Liberty
-1,017,867	-24,507	-5,586	472,440	575,520
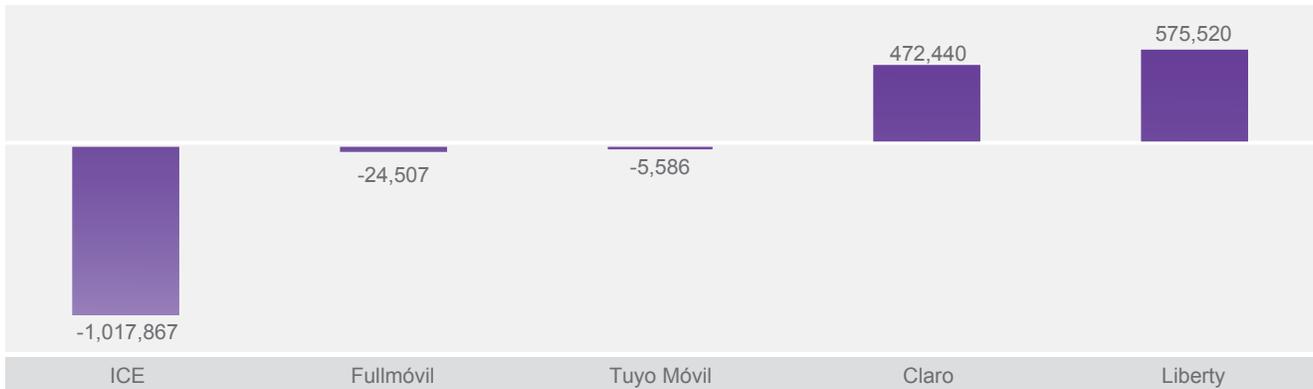
1 Net ports: Number of imported ports minus exported ports.
2 Only includes successful ports; i.e.: telephone number ports that were successfully activated on a different operator's network.
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

Data
transfer

FIXED INTERNET

Subscriptions

The evolution of fixed Internet service (retail) in 2024 is presented. Subscriptions, revenue, and data traffic associated with this service are reviewed not only for this year, but also for the 2020-2024 period. Revenue and subscription variables are presented by technology and speed at various points in the analysis, while traffic is shown only in totals. At the end, the status of connections and revenues for wholesale access services can be seen.

Graph No. 135 shows the total number of fixed Internet subscriptions for the 2020-2024 period. As can be seen, there is a positive increase each year, closing 2024 with 1,194,638 subscriptions, 3.9 % more than in 2023. It should be noted that in absolute terms, the increase from 2020 to 2024 is 289,904 subscriptions. For the same period, the quarterly variation is shown in Graph No. 136, which is always positive in each quarter throughout the period (the average annual growth for the first quarters is 5.9 %, for the second quarters 5.4 %, for the third quarters 4.7 % and also 4.7 % for the fourth quarters).

Graph No. 137 compares the month-on-month evolution of subscriptions by year. A growing trend towards the end of each year can be seen in the period; for example, in 2024, from January to December, the average monthly variation was 0.3 % (the highest average variation from January to December occurred in 2020 with 0.7 %).

The breakdown of subscriptions is expanded by technology. In this regard, Graph No. 138 shows the number of subscriptions for HFC networks, copper networks, fiber optic networks, and wireless access networks. It can be observed that in the last five years, cable modem Internet service subscriptions have fallen by 156,233 customers, copper subscribers

by 179,637, while fiber optic networks have increased by 511,945 subscriptions. Similarly, wireless services have also seen positive growth.

> **from 2020 to 2024, 511,945 fiber optic Internet subscriptions were added**

Graph No. 139 shows the cumulative total per month of subscriptions for each technology. When calculating the average monthly growth from January 2020 to December 2024, we obtain a negative variation of -0.39 % for cable networks, -2.89 % for copper networks, 3.02 % for fiber optic networks, and 3.11 % for the group of wireless technologies/others. Then, Graph No. 140 shows the percentage distribution by technology at the end of each year. Cable modem subscriptions represent 39.9 % in 2024 (59.8 % in 2020), copper customers account for 2.9 % in 2024 (20.2 % in 2020), while fiber subscribers account for 54.4 % of the total in 2024 (13.1 % in 2020) and finally wireless network subscriptions represent 2.7 % in 2024 (0.6 % in 2020).

Graph No. 141 shows the breakdown of subscriptions by speed for the 2020-2024 period. The four speed ranges indicated by the ITU in its indicator manual are shown, and it can be observed that in the range of speeds below 2 Mbps there is a decline from 166,476 subscriptions in 2020 to 4,271 subscriptions in 2024. The same trend can be observed in the 2 Mbps to 10 Mbps range, which decreased by 273,863 subscriptions during that five-year period. The 10 Mbps to 100 Mbps range showed a gradual increase from 2020 to 2023, but declined in 2024, and despite covering 48.5 % of customers, its volume fell by 20 % compared to 2023. Finally, the range of speeds above 100 Mbps grew by 81 % in 2024 compared to 2023.

Graph No. 142 provides a more detailed breakdown by month of subscriptions for the speed ranges indicated. It shows the monthly performance for the 2020-2024 period. There is an increase in users in the higher speed ranges, with an average monthly growth of 5.2 % in the speed range above 100 Mbps.

However, Graph No. 143 shows, for 2024 only, the speed ranges requested by SUTEL. In these, the range from 100 Mbps to 250 Mbps covers 31.24 % of subscriptions, followed by the range from 30 Mbps to 100 Mbps with 28.09 %. Graph No. 144 expands on this detail, showing the percentages of subscriptions at each speed at the end of each year in the period. The range with speeds greater than 100 Mbps shows the largest increase, with 41.6 pp more in 2024 than in 2020.

Below is some interesting data based on subscriptions. Graph No. 145 shows the calculation of the market concentration index (HHI) for the aforementioned period, which is calculated at 1826 points, a total of 502 points less than in 2020, indicating a moderate market concentration according to SUTEL's competition guidelines.

On the other hand, Graph No. 146 shows the market share at the end of 2024, where Liberty Servicios Fijos LY covers 25.4 % of subscriptions, Telecable 24.8 %, ICE (Kölbi) 17.2 %, Millicom Cable Costa Rica (Tigo) 15.4 %, Claro CR Telecomunicaciones 3.5 %, Cooperativa de Electrificación Rural de San Carlos (Coopelesca) 3.4 %, and 10.3 % for the other 67 operators active in the market in 2024.

To conclude the section on subscriptions, Graph No. 147 shows fixed Internet penetration per inhabitant over the five-year period, closing 2024 at 23.1 %, which is 1.2 pp higher than the previous year. Graph No. 148 shows fixed Internet penetration per household, which increases by 1.8 pp compared to 2023.

Traffic

Graph No. 149 shows the data traffic in TB recorded for the 2020-2024 period. At the end of the period, the total is 6,004,558 TB, a variation of 30.5 % compared to 2023 (a value that was updated to 4,599,788 TB with the cooperation of operators and providers). The average annual growth for the five years is estimated at 27.8 %.

Graph No. 150 also shows the comparison by quarter between the years 2020-2024, where it can be seen that there is a year-on-year increase between each quarter; the average growth between quarters exceeds 18.2 % in all cases; with an estimated 18.3 % for the first quarter, 18.6 % for the second, 40.7 % for the third, and 43.3 % for the fourth quarter.

Finally, Graph No. 151 presents an estimate of average monthly traffic per user in 2024. It can be seen that in January this value is 368.7 GB on average per user and gradually increases to 418.3 GB per user in December 2024. The month with the highest consumption was August, with 498.7 GB per user.

Revenue

The revision of the revenue indicator in the fixed Internet retail segment for the 2020-2024 period is shown. Graph No. 152 shows total revenue per year; in 2024, the total was 216,614 million colones, a variation of 7.2 % compared to 2023 and 26.8 % more than in 2020. Graph No. 153 shows the quarterly comparison of revenues. When calculating the average variation between the same quarters of each year, there are increases of 6.8 % for the first quarters, 6.0 % for the second quarters, 6.5 % for the third quarters, and finally, 5.2 % for the fourth quarters.

Graph No. 154 shows the revenue per month for each year. This allows us to compare the evolution within each year and see similar behaviors with the other years in the period. It is noteworthy that in 2020, income remained relatively stable from month to month, closing December at 13,372 million colones. Then, in 2021, income recovered from the beginning of the year, closing December 2021 at 16,668 million colones, a trend that continued in 2022, but shows a decrease in 2023, until 2024, when an increase in revenue volume is observed, closing in December 2024 with 18,181 million colones.

Graph No. 155 shows the behavior of fixed Internet revenues by technology. This graph shows the total revenue generated according to connection technology for the 2020-2024 period. It can be seen that, in cable networks, the average annual variation was -4.5 %, and in copper networks, it was -28.1 %. For fiber optic networks, the average annual variation was 26.1 %, and in the wireless/other category, there was a variation of 22.2 % for the period.

Next, the revenue indicator by technology and speed is shown. For such purposes, Graph No. 156 shows the monthly total revenue, by technology, for the years 2020 to 2024. It can be seen that the average monthly growth in fiber optic networks was 1.8 % (4,092 million colones in January 2020 and 11,820 million in December 2024) and that wireless technology also achieved a variation of 1.8 %.

Graph No. 157 shows the share of revenue recorded at the end of each year for the 2020-2024 period. In the wireless/other group, the share was 2.8 % in 2020 and 5.8 % in 2024. Copper will go from 19.1 % in 2020 to 4.0 % in 2024. In coaxial cable subscriptions, the share in 2020 was 45.1 %, and in 2024 it will be 25.2 %. Finally, the share for fiber is 33.0 % in 2020 and 65.0 % in 2024.

Graph No. 158 shows the breakdown of revenue by speed range (ITU), comparing revenue between 2020 and 2024. It can be seen that the speed range above 100 Mbps shows an average annual growth of 58.7 % between 2020 and 2024 (97,603 million colones recorded in fiber in 2024); for the range from 10 Mbps to 100 Mbps, the variation in the period was 1.8 %. In the lower speed ranges, revenues decrease as a result of fewer subscriptions.

Next, Graph No. 159 shows the monthly revenues in the same four ranges mentioned for the period from 2020 to 2024. It can be seen that the range of contracted speeds greater than 100 Mbps has the highest average monthly variation at 4.0 % (in January 2020, it was 992 million colones, and in December 2024, it was 9,916 million colones).

In line with the study by speed, Graph No. 160 shows the monthly value of revenues according to the speed ranges that SUTEL requested from operators in 2024. It can be seen that revenues obtained for speeds below 10 Mbps remain below 1,000 million colones towards December 2024. On the other hand, the ranges from 30 Mbps to 100 Mbps and from 100 Mbps to 250 Mbps each account for a total of 61,832 million colones and 62,104 million colones, respectively. It should be noted that speeds above 250 Mbps have an average monthly growth of 6.6 %, starting in January with 2,094 million colones and closing in December with 4,234 million colones.

"In 2024, 45.1 % of revenue came from subscriptions with download speeds between 100 Mbps and 250 Mbps"

Graph No. 161 shows the percentage distribution by speed range at the end of each year. It can be seen that the range of over 100 Mbps covers a total of 45.1 % in 2024 (9.0 % in 2020). It is also noteworthy that the speed ranges of 2 Mbps to 10 Mbps and speeds below 2 Mbps show a sustained decline over the period and in 2024, between them, represent only 5.7 % of revenue.

In addition, Graph No. 162 shows the monthly average revenue per user for the period from 2020 to 2024. In January 2020, this value was calculated at 14,823 colones per user per month, fluctuating to reach 15,219 colones in December of that year. The values for December of each year are highlighted below: 15,252 colones per user in 2020, 15,648 in 2021, 15,442 in 2022, and 15,198 in 2023.

Graph No. 163 shows the monthly average income per user for wired access technologies (coaxial cable, fiber optics, and copper). In 2020, this value for fiber users remained close to 35,000 colones until December 2021, when it fell to 21,001 colones. This trend continued until the end of 2024, when it reached 18,177 colones. For copper, there was a fluctuation in this value after 2020, closing in December 2024 at 20,842 colones. In fixed Internet service via cable networks, the values fluctuate less and close 2024 at 9,609 colones.

Finally, Graph No. 164 shows the monthly value of average revenue per user according to speed ranges. At speeds below 10 Mbps, the revenue per user at the end of 2024 is estimated to be 19,901 colones per user (10,457 colones in January 2020), then, in the range of 10 Mbps to 100 Mbps, it is 12,891 colones per user in 2024 (18,129 colones in January 2020), and finally, for speeds above 100 Mbps, this value is estimated at 17,237 colones in December 2024 (34,646 colones in January 2020).

WHOLESALE INTERNET SERVICES

Connections

The status of connections and revenues for fixed Internet service in the wholesale market is presented below. Graph No. 165 shows the number of companies that reported this service between 2020 and 2024; it can be seen that for 2024, as in 2023, the number of operators in this service was 17. Graph No. 166 shows the number of connections registered for the 2020-2024 period ; at the end of 2024, there were 2,812 connections. Graph No. 167 shows wholesale Internet connections per quarter for the five-year period from 2020 to 2024. As can be seen, there is an increase for each quarter during the five years: 41.9 % for the first quarters, 31.8 % for the second quarters, 31.6 % for the third quarters, and 32.3 % for the fourth quarters.
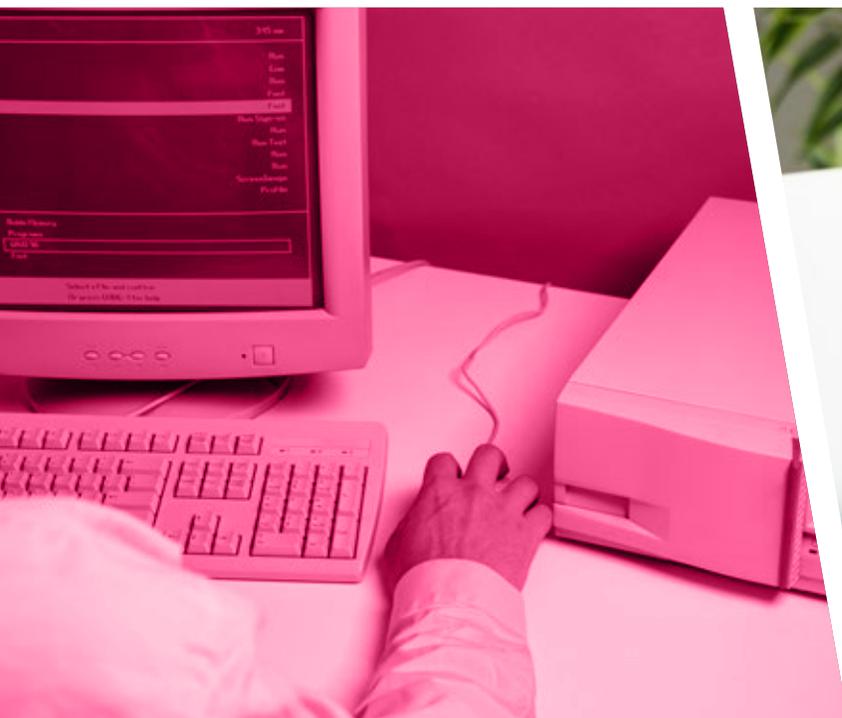
Graph No. 168 shows the evolution of subscriptions by technology on a monthly basis since 2020. It can be seen that the PON/AON/Ethernet/+ technology group represents the vast majority of connections in the period (rising from 431 in January 2020 to 2,585 in December 2024). In addition, Graph No. 169 shows the share by technology at the end of each year of the period. In 2024, the PON/AON/Ethernet/+ technology group covers 91.9 %.

Finally, Graph No. 170 shows the share by speed range at the end of each year of the period. In 2024, the 10 Mbps to 100 Mbps range remains the largest share with 57.6 %. It should be noted that the speed range of more than 1 Gbps fell from 7.1 % in 2020 to 2.6% in 2024.

Revenue

Revenue movements for wholesale Internet access service is presented now. Graph No. 171 shows total revenue for the 2020-2024 period. There is a decrease from 11,166 million colones in 2023 to 9,990 million colones in 2024 (the average annual variation for the period is 3.0 %).

Graph No. 172 shows a comparison of quarterly revenues for the period, where the behavior is different for each quarter, the average quarterly variation is 3.6 % for the first quarters, 9.2 % for the second quarters, 1.2 % for the third quarters, and finally -1.6 % for the fourth quarters.

Graph No. 173 shows the value of revenues by technology; in DWDM, the average monthly variation was -5.3 %, for the SDH/Microwave group it was 2.8 %, and for the PON/AON/Ethernet/+ connections group, it was 0.6 %. Graph No. 174 shows the share of revenue for each technology group, with the PON/AON/Ethernet+/ group accounting for 79.7 % of total revenue in 2024.

Graph No. 175 concludes by showing the share of revenue by speed range for the period. In 2024, the speed range of up to 10 Mbps covers 11.8 %, the range from 10 Mbps to 100 Mbps covers 39.2 %, speeds from 100 Mbps to 1 Gbps cover 20.9 %, and the speed group from 1 Gbps to 600 Gbps covers 28.1 %.

GRAPH 135. COSTA RICA: Total fixed Internet subscriptions by year-end in 2020-2024
(yearly figures)

Year	Subscriptions
2020	992,725
2021	1,058,767
2022	1,105,670
2023	1,149,933
2024	1,194,638
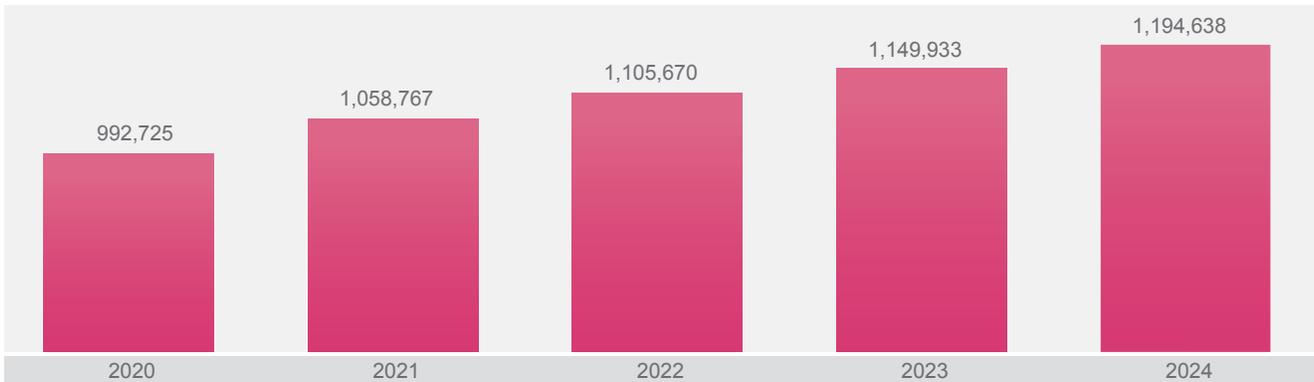
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 136. COSTA RICA: Fixed Internet subscriptions per quarter in 2020-2024
(quarterly figures)

	2020	2021	2022	2023	2024
Q1	926,362	1,020,653	1,074,944	1,124,333	1,165,442
Q2	950,278	1,024,865	1,080,825	1,134,411	1,174,214
Q3	969,498	1,044,185	1,103,529	1,128,977	1,164,637
Q4	992,725	1,058,767	1,105,670	1,149,933	1,194,638

■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024
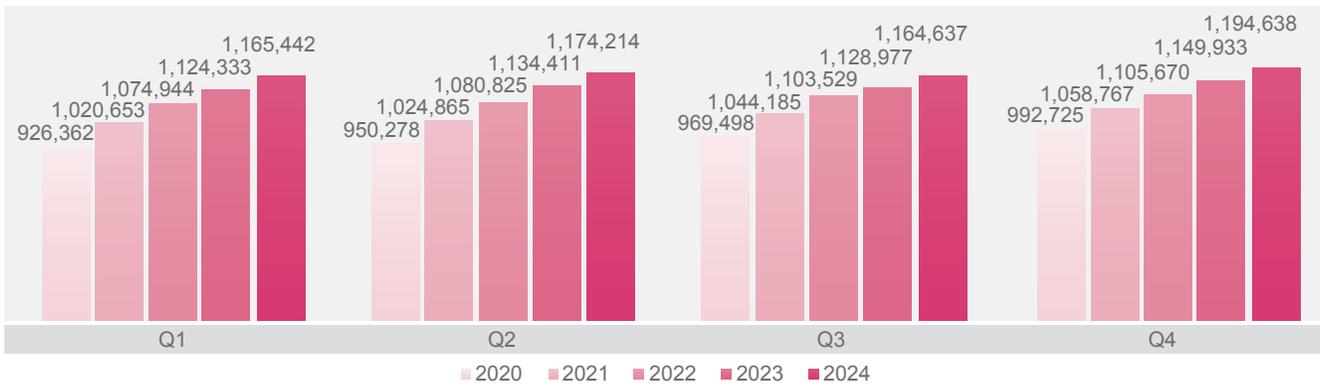
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 137. COSTA RICA: Fixed Internet subscriptions, per month, annual comparison, 2020-2024
(monthly figures)

	jan	dec
2020	915,308	992,725
2021	999,942	1,058,767
2022	1,061,609	1,105,670
2023	1,125,959	1,149,933
2024	1,159,357	1,194,638

■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024
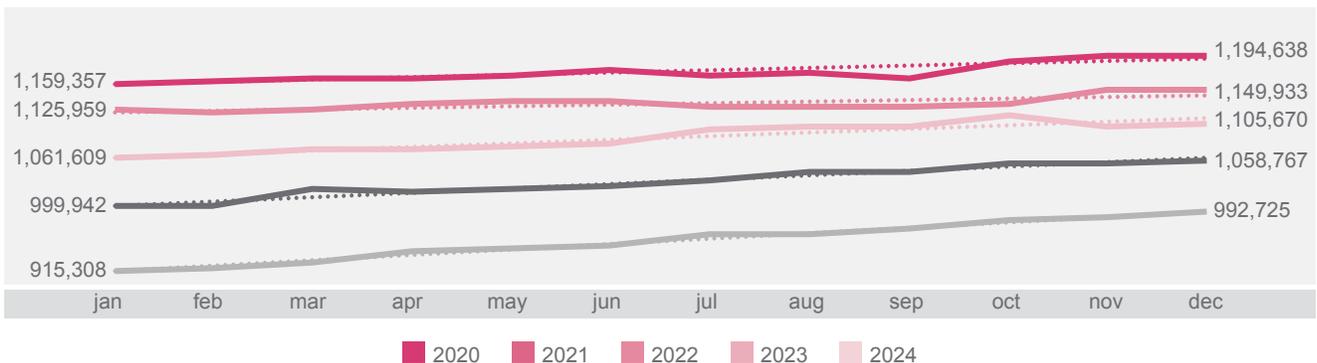
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 138. COSTA RICA: Fixed Internet subscriptions per type of technology (annual comparison) in 2020-2024
(yearly figures)

Cable modem:
- 2020: 633,407
- 2021: 629,742
- 2022: 573,514
- 2023: 527,589
- 2024: 477,174

xDSL:
- 2020: 214,330
- 2021: 132,684
- 2022: 83,280
- 2023: 69,743
- 2024: 34,693

Optical fiber:
- 2020: 138,350
- 2021: 289,249
- 2022: 441,734
- 2023: 545,837
- 2024: 650,295

Wireless/Others:
- 2020: 6,638
- 2021: 7,092
- 2022: 7,142
- 2023: 6,764
- 2024: 32,476

Legend: 2020, 2021, 2022, 2023, 2024
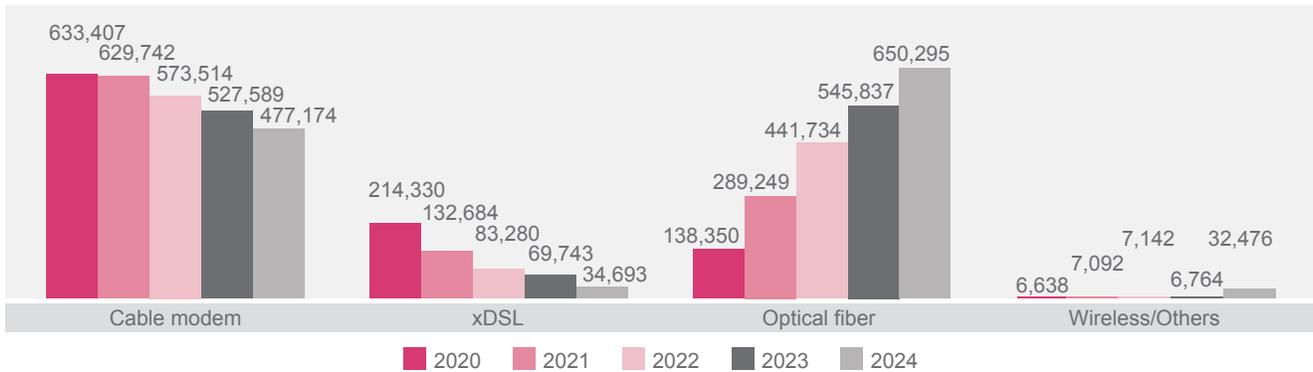
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 139. COSTA RICA: Fixed Internet subscriptions per type of technology (monthly comparison) in 2020-2024
(monthly figures)

Legend: Cable modem, xDSL, Optical fiber, Wireless/Others
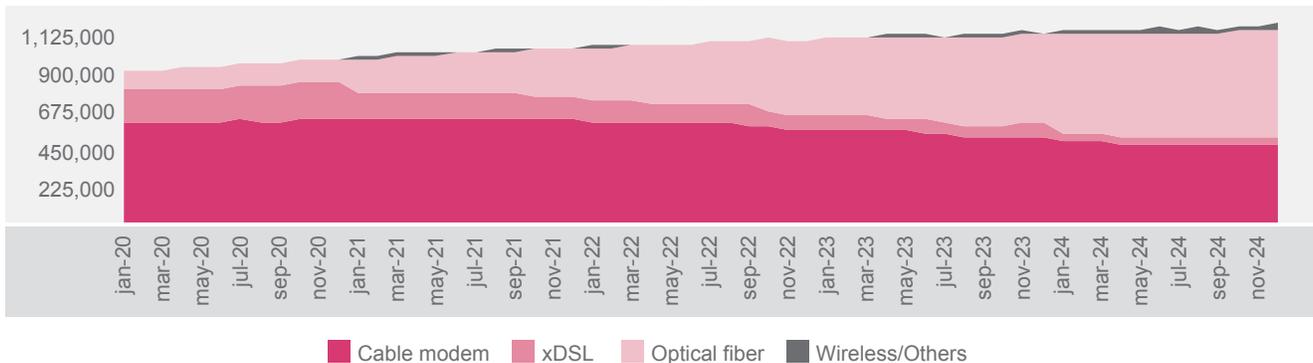
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 140. COSTA RICA: Fixed Internet subscriptions, percentage distribution by technology, at year-end, 2020-2024
(figures in percentage terms)

	2020	2021	2022	2023	2024
Wireless/Others	0.6 %	0.7 %	0.6 %	0.6 %	2.7 %
Optical fiber	13.1 %	27.3 %	40.0 %	47.5 %	54.4 %
xDSL	20.2 %	12.5 %	7.5 %	6.1 %	2.9 %
Cable modem	59.8 %	59.5 %	51.9 %	45.9 %	39.9 %

Legend: Cable modem, xDSL, Optical fiber, Wireless/Others
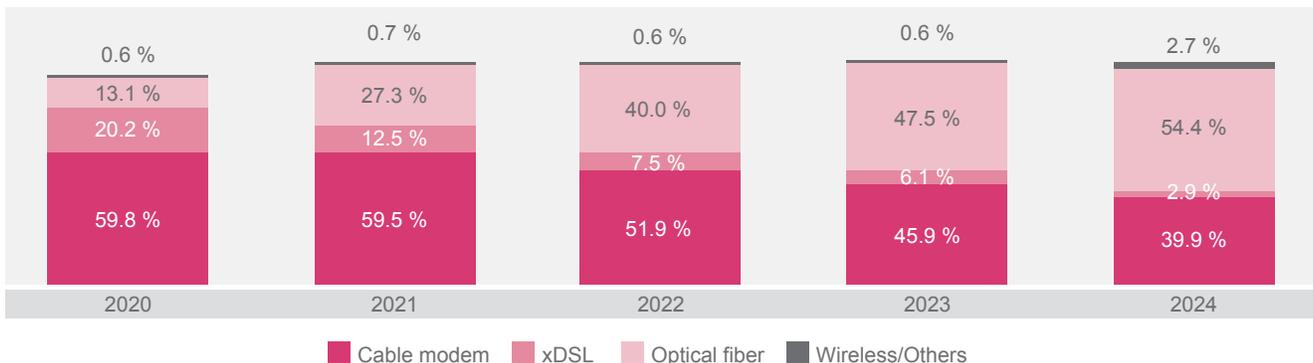
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 141. COSTA RICA: Number of fixed Internet subscriptions per advertised speed range (ITU) in 2020-2024
(yearly figures)
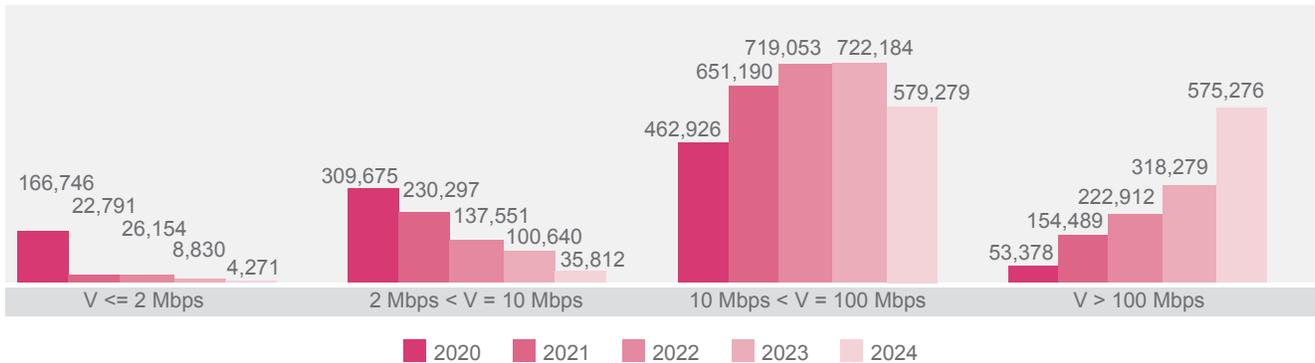
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 142. COSTA RICA: Monthly comparison of fixed Internet subscriptions per speed range (ITU) in 2020-2024
(monthly figures)
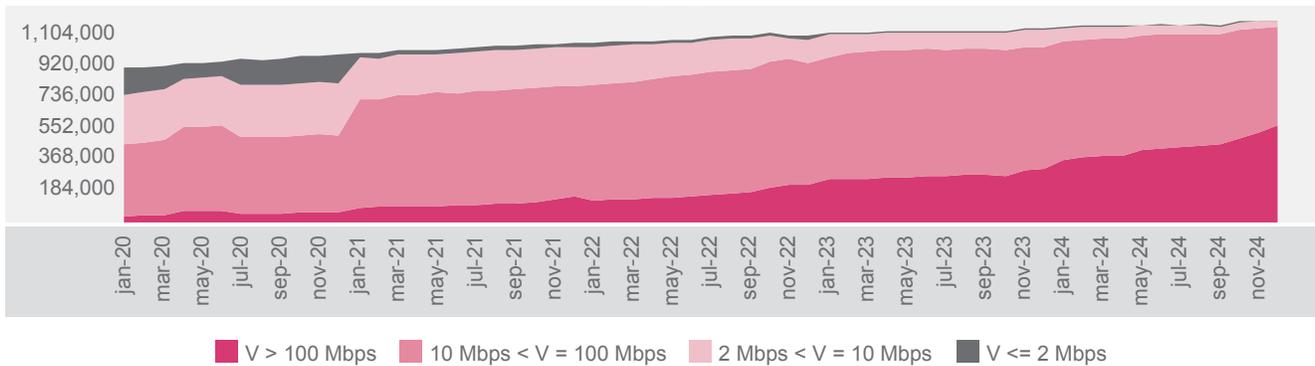
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 143. COSTA RICA: Monthly comparison of fixed Internet subscriptions per speed range (SUTEL) in 2024
(monthly figures)

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

137
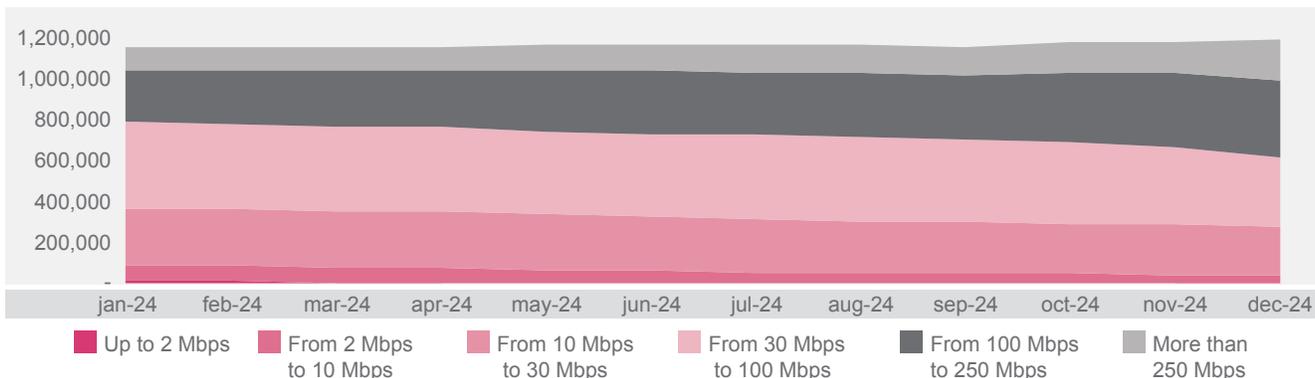
GRAPH 144. COSTA RICA: Percentage distribution of fixed Internet subscriptions per speed range (year-end) in 2020-2024
(figures in percentage terms)

	Up to 2 Mbps	From 2 Mbps to 10 Mbps	From 10 Mbps to 30 Mbps	From 30 Mbps to 100 Mbps	More than 100 Mbps
2020	16.8 %	31.2 %	30.8 %	15.8 %	5.4 %
2021	21.8 %	33.4 %	28.1 %	14.6 %	2.2 %
2022	12.4 %	28.6 %	36.4 %	20.2 %	2.4 %
2023	8.8 %	26.4 %	36.4 %	27.7 %	0.8 %
2024	3 %	20.4 %	28.1 %	48.2 %	0.4 %
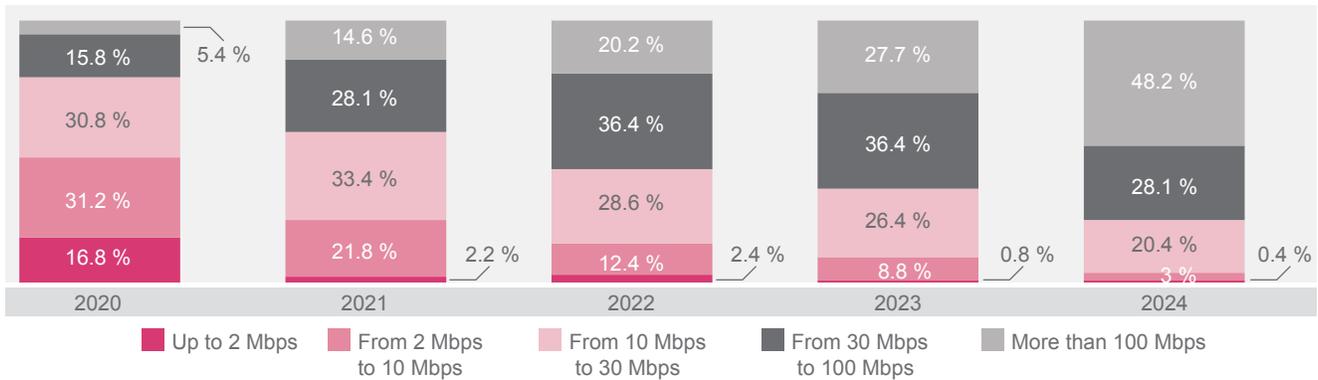
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 145. COSTA RICA: Evolution of the HHI index in the fixed Internet sector in 2020-2024
(yearly figures)

2020	2021	2022	2023	2024
2,328	2,191	2,104	1,987	1,826
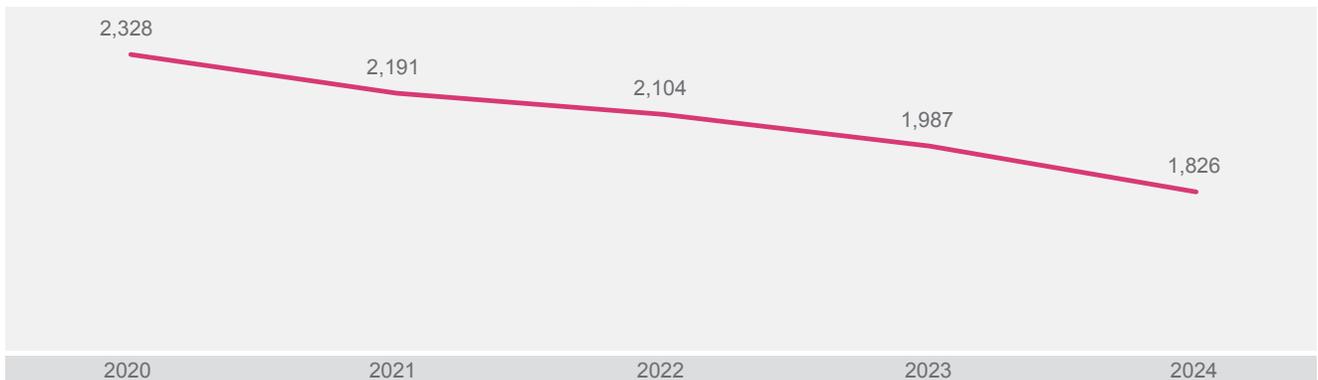
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 146. COSTA RICA: Market share of fixed Internet subscriptions by year-end 2024
(figures in percentage terms)

- 25,4 %
- 24,8 %
- 17,2 %
- 15,4 %
- 3,5 %
- 3,4 %
- 10,3 %

- LIBERTY SERVICIOS FIJOS LY S.A.
- TELECABLE, S.A.
- INSTITUTO COSTARRICENSE DE ELECTRICIDAD
- MILLICOM CABLE COSTA RICA S.A
- CLARO CR TELECOMUNICACIONES, S.A.
- COOPERATIVA DE ELECTRIFICACION RURAL DE SAN CARLOS, R.L.
- 67 other operators

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 147. COSTA RICA: Penetration of fixed Internet subscriptions per 100 inhabitants (year-end) in 2020-2024

(figures in percentage terms)

2020	2021	2022	2023	2024
19.4 %	20.5 %	21.0 %	21.9 %	23.1 %
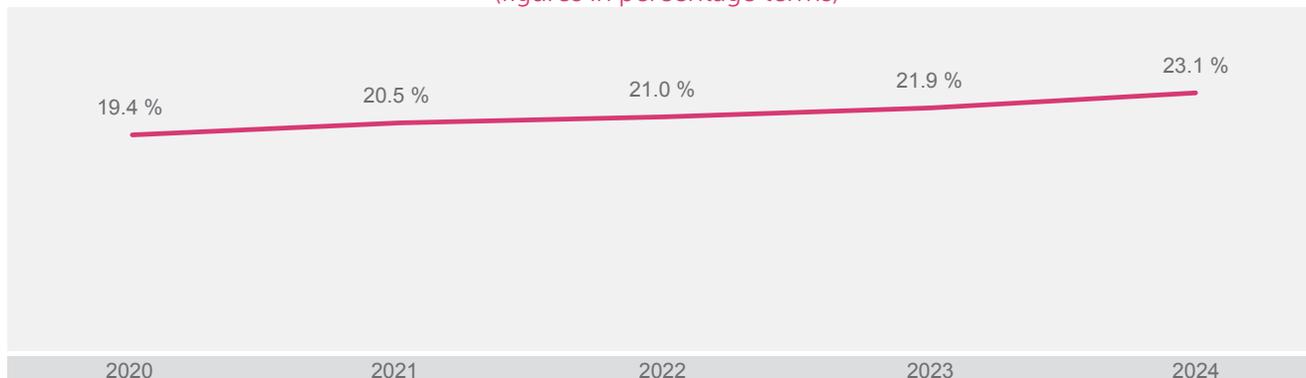
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 148. COSTA RICA: Penetration of fixed Internet subscriptions per 100 households (year-end) in 2020-2024

(figures in percentage terms)

2020	2021	2022	2023	2024
62.8 %	64.2 %	64.2 %	64.6 %	66.0 %
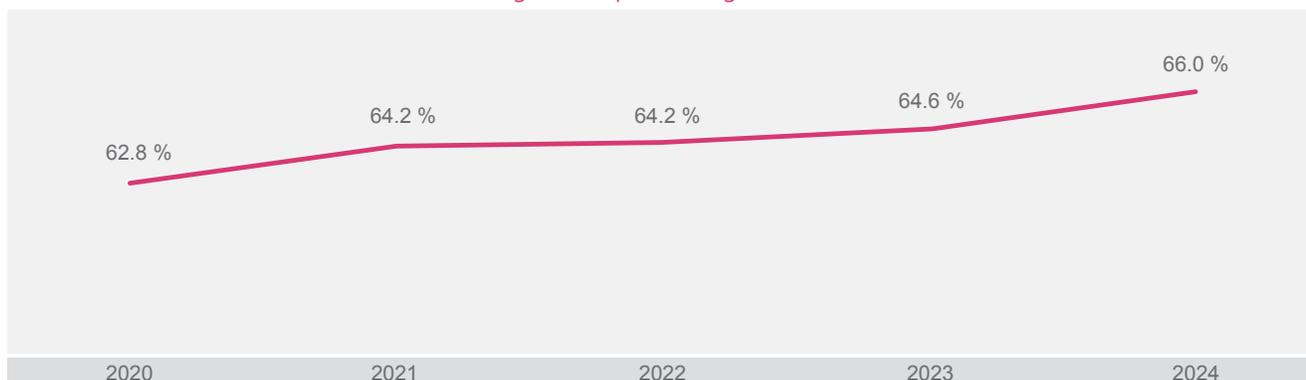
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 149. COSTA RICA: Total fixed Internet traffic (year-end) in 2020-2024

(figures in TB)

2020	2021	2022	2023	2024
2,249,887	3,069,352	3,728,233	4,599,796	6,004,558
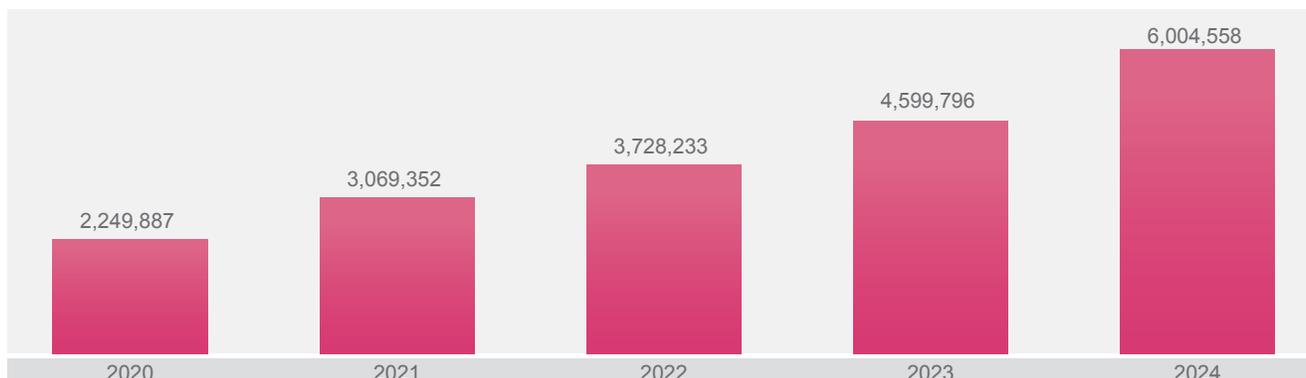
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 150. COSTA RICA: Fixed Internet traffic, by quarter, 2020-2024
(figures in TB)

	I T	Q2	Q3	Q4
2020	419,858	565,280	622,508	642,241
2021	689,451	754,105	810,584	815,212
2022	836,155	867,440	979,746	1,044,891
2023	1,052,032	1,182,304	1,196,946	1,168,515
2024	1,243,869	1,402,302	1,684,416	1,673,971
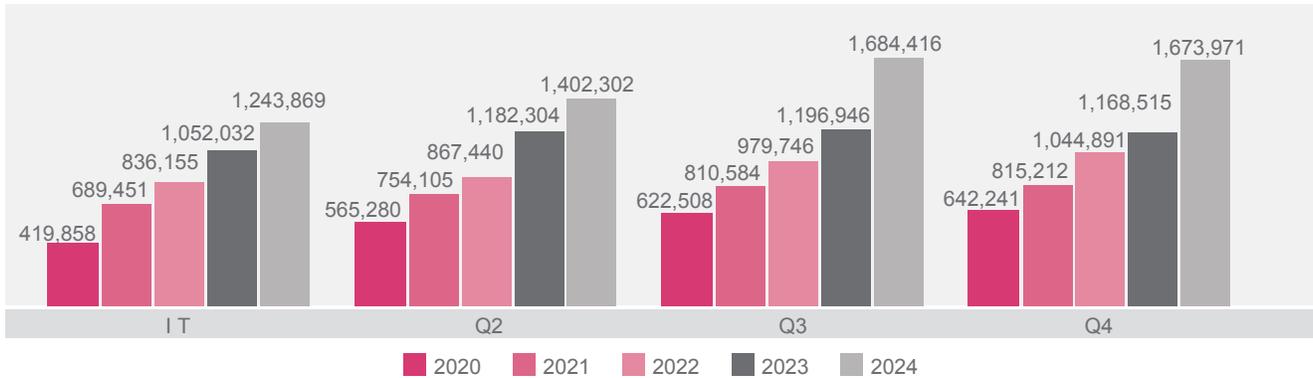
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 151. COSTA RICA: Fixed Internet traffic per user (average) by month in 2024
(figures in GB of data per subscriber)

Month	Value
jan-24	368.7
feb-24	353.4
mar-24	373.5
apr-24	377.1
may-24	380.1
jun-24	470.5
jul-24	488.9
aug-24	498.7
sep-24	488.6
oct-24	472.4
nov-24	483.5
dec-24	481.3
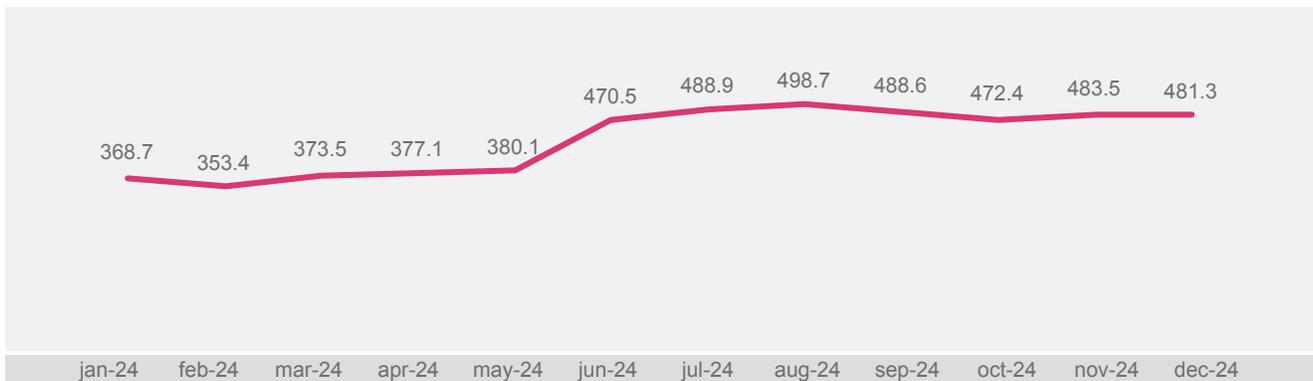
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 152. COSTA RICA: Total revenue from fixed Internet subscriptions (year-end) in 2020-2024
(figures in millions of colones)

Year	Value
2020	170,879
2021	192,484
2022	206,476
2023	201,991
2024	216,614
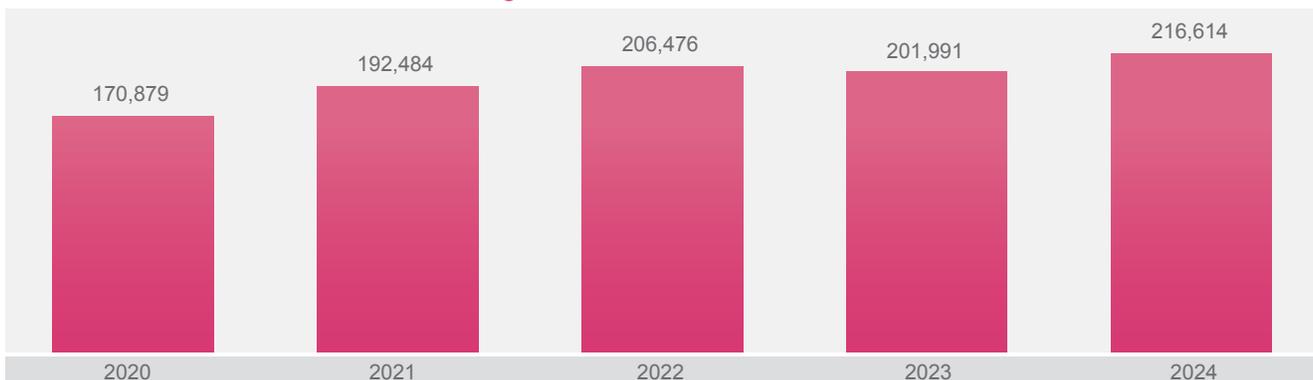
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 153. COSTA RICA: Fixed Internet access revenue, per quarter, 2020-2024
(figures in millions of colones)

Quarter	2020	2021	2022	2023	2024
I T	40,781	46,363	50,726	49,812	53,116
Q2	42,420	48,246	52,523	51,057	53,587
Q3	42,823	48,585	51,724	49,928	55,030
Q4	44,855	49,290	51,502	51,193	54,880
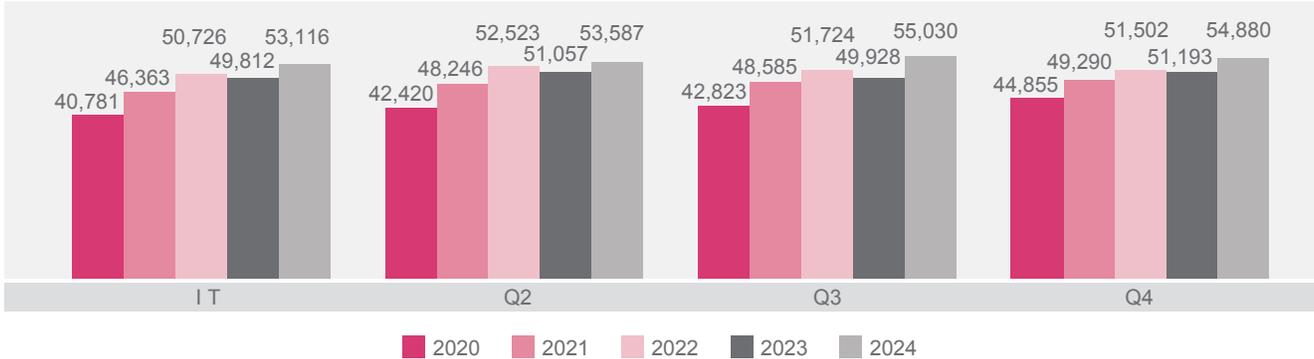
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 154. COSTA RICA: Revenue from fixed Internet subscriptions per month (annual comparison) in 2020-2024
(figures in millions of colones)

End-of-year values: 18,181; 17,481; 17,074; 16,568; 13,372
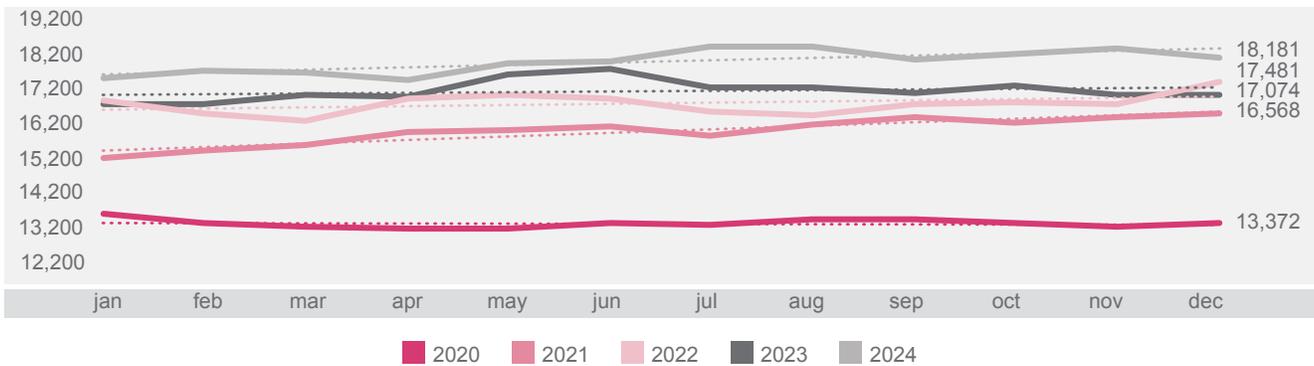
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 155. COSTA RICA: Revenue from fixed Internet subscriptions per type of technology by quarter in 2020-2024
(figures in millions of colones)

Technology	2020	2021	2022	2023	2024
Cable modem	76,218	82,660	78,974	67,790	63,509
xDSL	37,460	36,091	31,788	13,864	10,011
Optical fiber	52,513	68,772	91,008	116,717	132,631
Wireless/Others	4,688	4,961	4,705	3,621	10,462
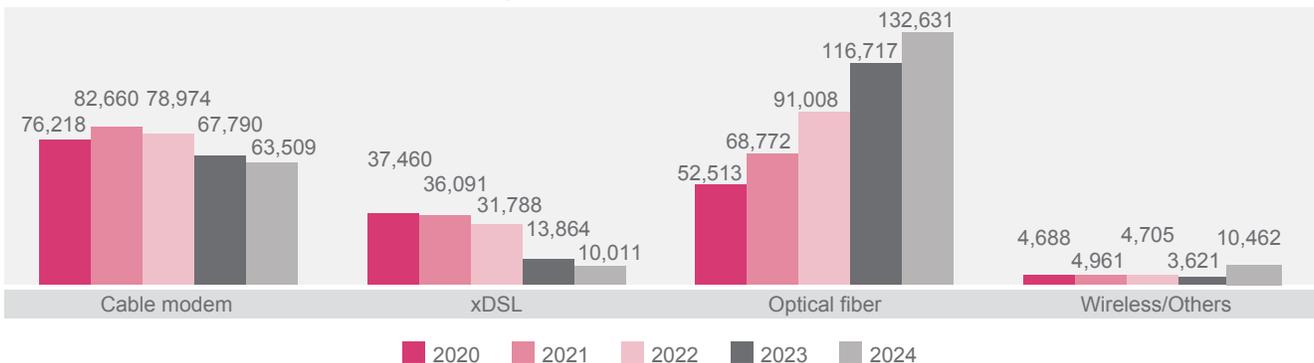
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 156. COSTA RICA: Fixed Internet access revenue, by technology, per month, 2020-2024

(figures in millions of colones)

Legend: Cable modem ■ xDSL ■ Optical fiber ■ Wireless/Others
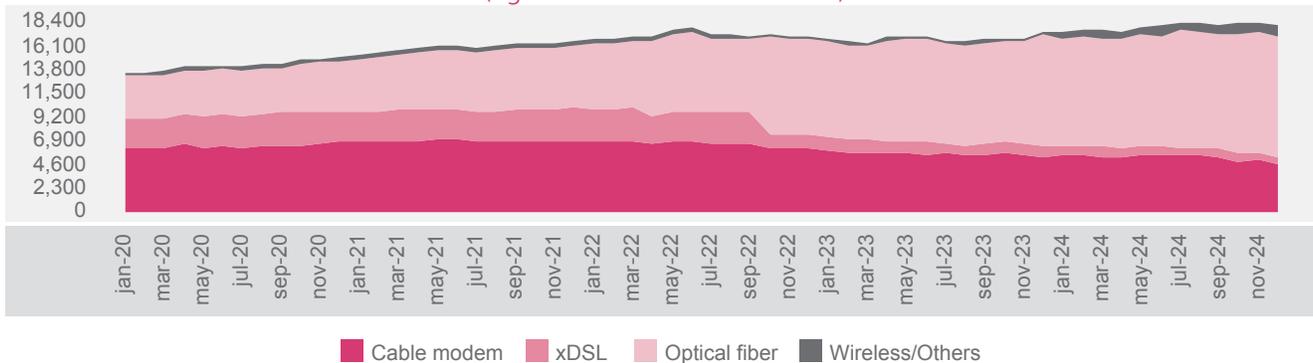
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 157. COSTA RICA: Fixed Internet access revenue, percentage distribution by technology, per month, 2020-2024

(figures in percentage terms)

	2020	2021	2022	2023	2024
Wireless/Others	2.8 %	2.5 %	8.2 %	6.2 %	4.0 %
Optical fiber	19.1 %	19.5 %	1.7 %	1.6 %	5.8 %
xDSL	33.0 %	36.7 %	54.4 %	61.3 %	65.0 %
Cable modem	45.1 %	41.4 %	35.7 %	30.9 %	25.2 %

Legend: Cable modem ■ xDSL ■ Optical fiber ■ Wireless/Others
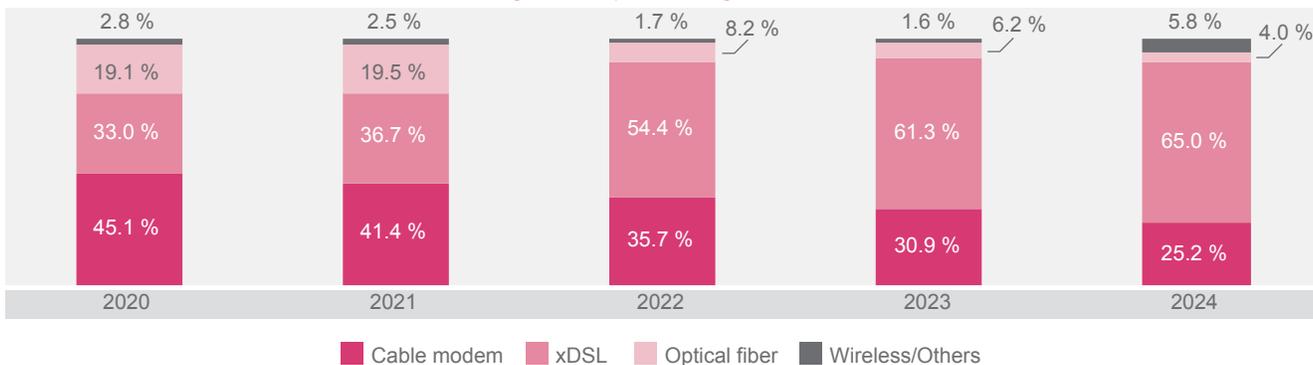
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 158. COSTA RICA: Revenue from fixed Internet subscriptions per speed range (year-end) in 2020-2024

(figures in millions of colones)

	2020	2021	2022	2023	2024
V <= 2 Mbps	19,199	7,816	6,855	2,359	1,917
2 Mbps < v = 10 Mbps	36,949	36,911	27,011	16,297	10,495
10 Mbps < v = 100 Mbps	99,340	118,820	128,289	116,677	106,598
100 Mbps < v	15,391	28,937	44,320	66,657	97,603

Legend: ■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024
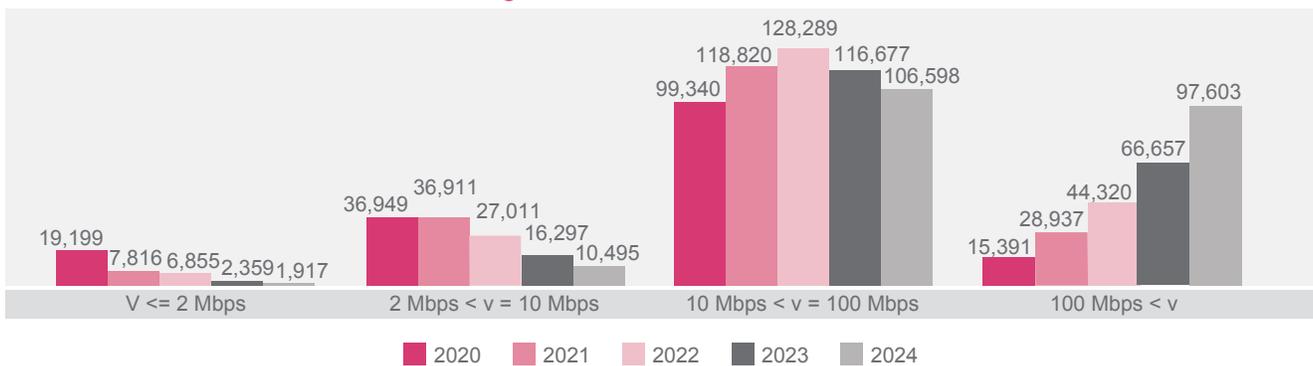
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 159. COSTA RICA: Fixed Internet access revenue, monthly comparison by speed range (according to ITU), 2020-2024

(figures in millions of colones)

Legend: V <= 2 Mbps | 2 Mbps < v = 10 Mbps | 10 Mbps < v = 100 Mbps | 100 Mbps < v
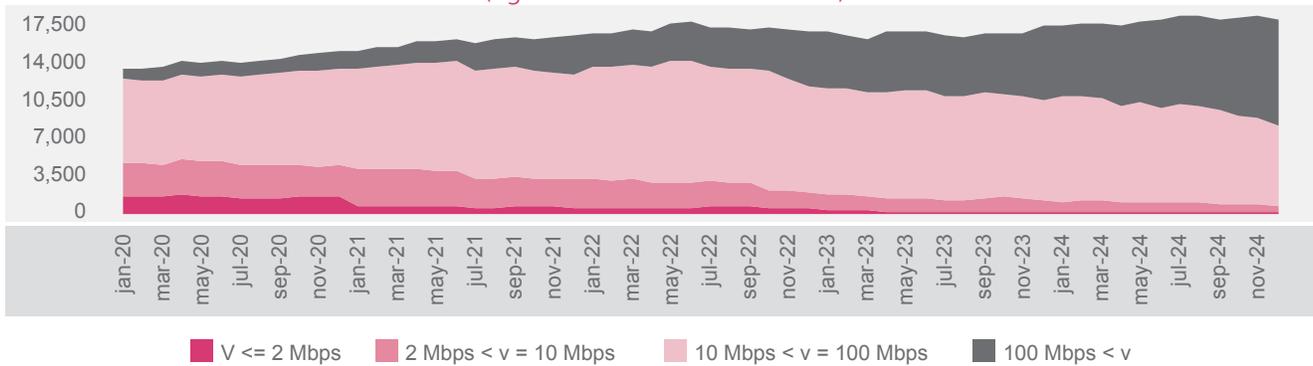
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 160. COSTA RICA: Fixed Internet access revenue, monthly comparison by speed range (according to SUTEL), 2024

(figures in millions of colones)

Legend: Up to 2 Mbps | From 2 Mbps to 10 Mbps | From 10 Mbps to 30 Mbps | From 30 Mbps to 100 Mbps | From 100 Mbps to 250 Mbps | More than 250 Mbps
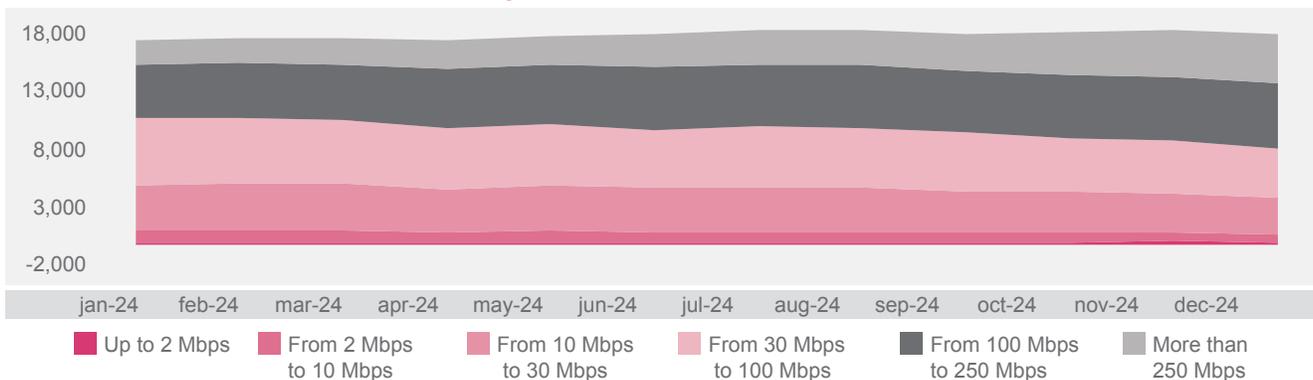
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 161. COSTA RICA: Revenue from fixed Internet subscriptions per speed range (year-end) in 2020-2024

(figures in percentage terms)

	2020	2021	2022	2023	2024
More than 100 Mbps	9.0 %	15.0 %	21.5 %	33.2 %	45.1 %
From 30 Mbps to 100 Mbps	21.6 %	24.3 %	28.8 %	33.3 %	28.5 %
From 10 Mbps to 30 Mbps	36.5 %	37.4 %	33.3 %	24.6 %	20.7 %
From 2 Mbps to 10 Mbps	21.6 %	19.2 %	13.1 %	7.7 %	4.8 %
Up to 2 Mbps	11.2 %	4.1 %	3.3 %	1.2 %	0.9 %

Legend: Up to 2 Mbps | From 2 Mbps to 10 Mbps | From 10 Mbps to 30 Mbps | From 30 Mbps to 100 Mbps | More than 100 Mbps
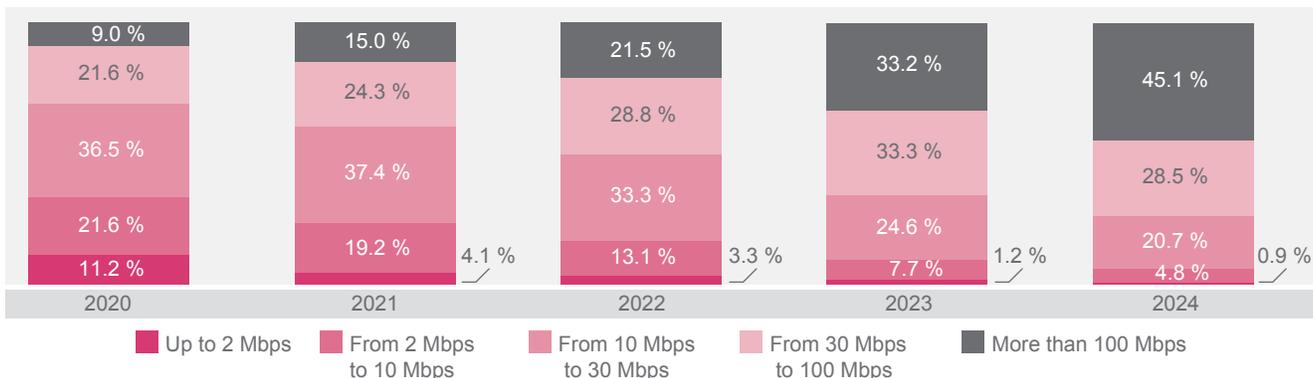
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 162. COSTA RICA: Fixed Internet access revenue, average revenue per user, monthly, 2020-2024

(figures in colones)

Legend: Cable modem — xDSL — Optical fiber — Wireless/Others
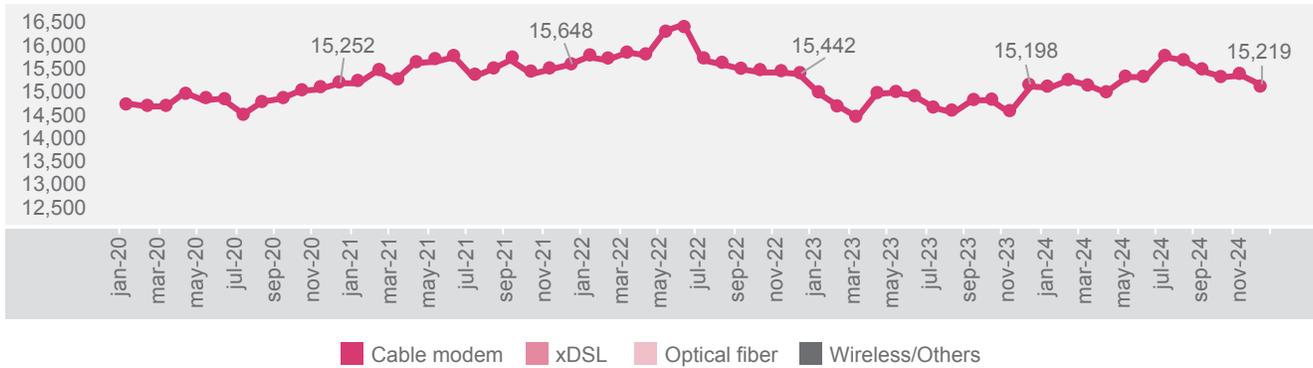
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 163. COSTA RICA: Monthly average revenue per user of fixed-line (wired) technologies in 2020-2024

(figures in colones)

Legend: Cable modem — xDSL — Optical fiber
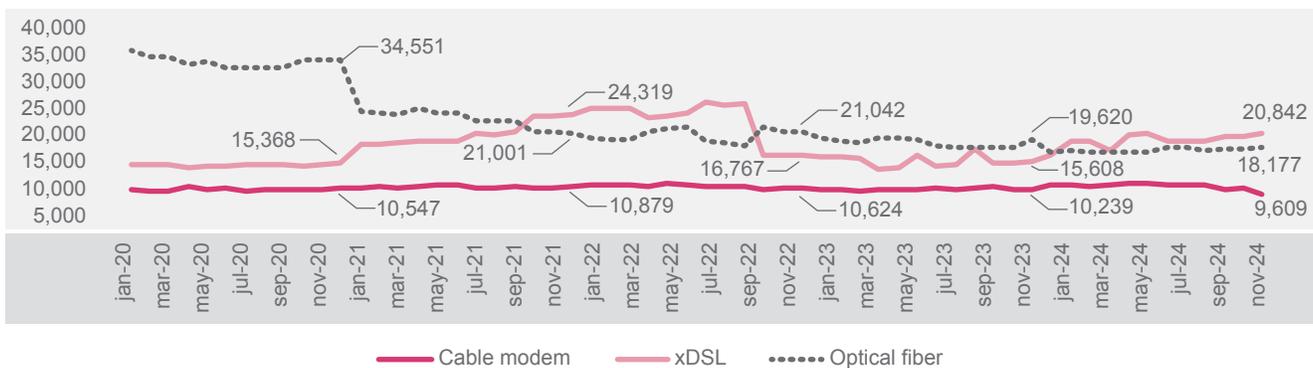
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 164. COSTA RICA: Monthly average revenue per user of fixed Internet services per Internet speed range in 2020-2024

(figures in colones)

Legend: V <= 10 Mbps — 10 Mbps < v = 100 Mbps — 100 Mbps < v
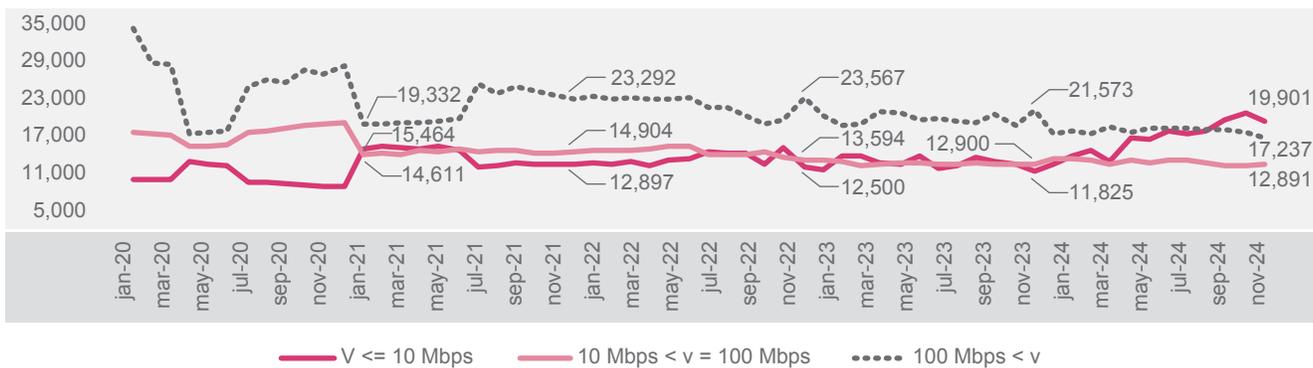
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

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GRAPH 165. COSTA RICA: Number of wholesale Internet access connections and participating companies in 2020-2024
(yearly figures)

Year	2020	2021	2022	2023	2024
Companies	16	17	15	17	17
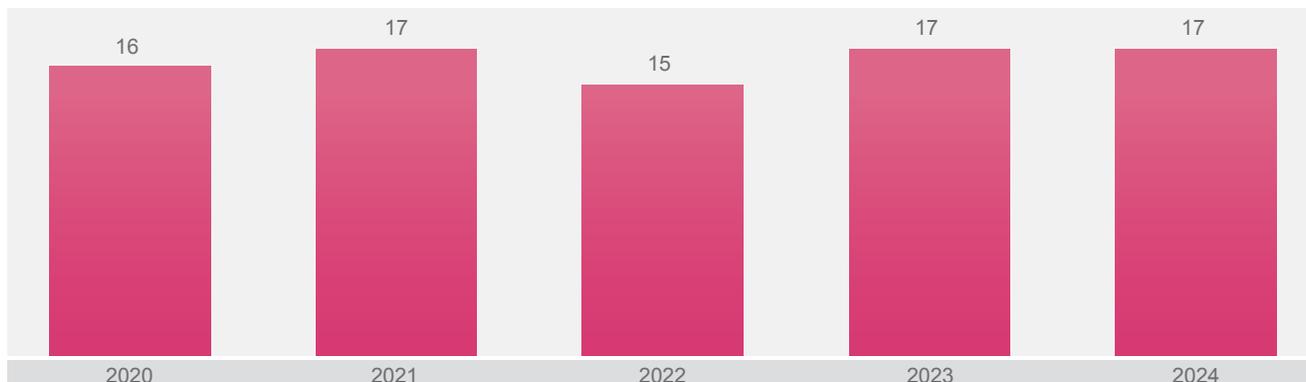
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 166. COSTA RICA: Total number of wholesale Internet access connections (year-end) in 2020-2024
(yearly figures)

Year	2020	2021	2022	2023	2024
Connections	918	2,553	2,442	2,777	2,812
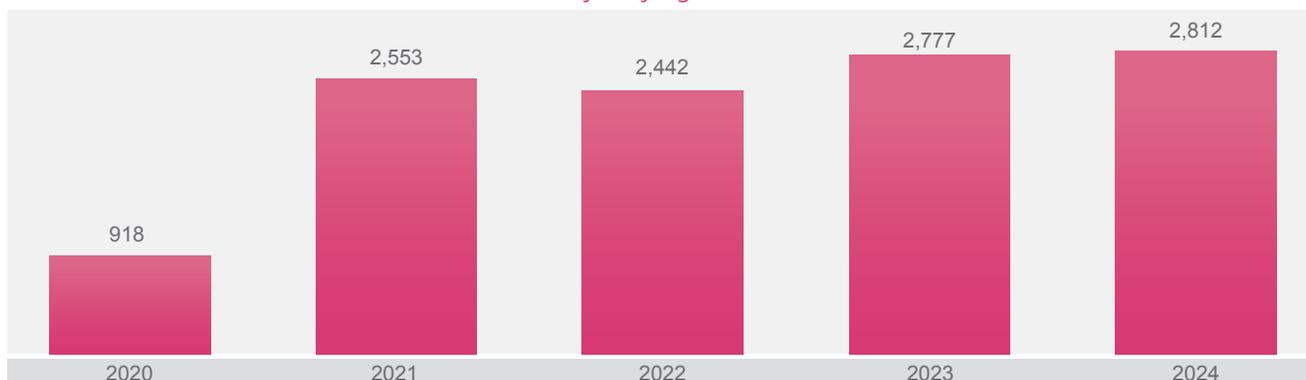
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 167. COSTA RICA: Number of wholesale Internet access connections per quarter in 2020-2024
(quarterly figures)

Quarter	2020	2021	2022	2023	2024
I T	736	1,761	2,490	2,421	2,983
Q2	968	1,897	2,466	2,386	2,917
Q3	996	2,308	2,742	3,073	2,986
Q4	918	2,553	2,442	2,777	2,812
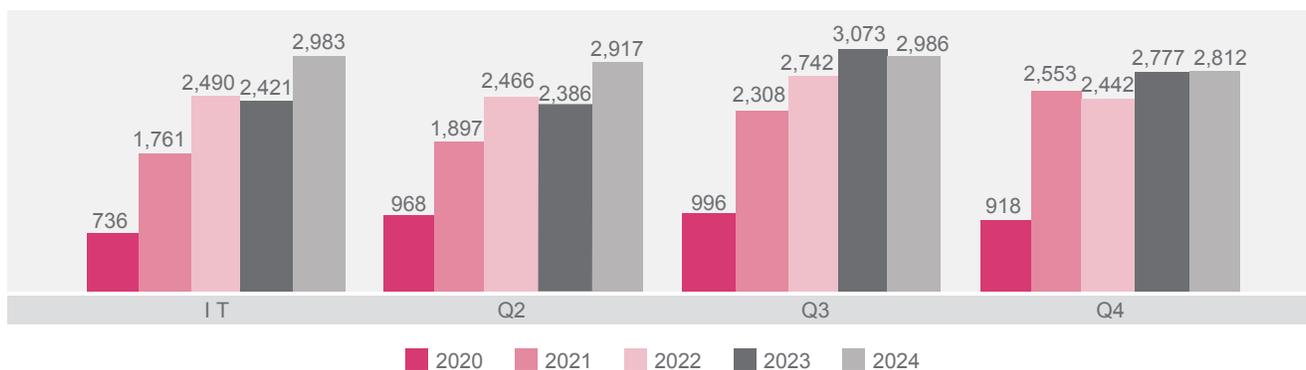
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 168. COSTA RICA: Wholesale Internet connections, by technology, at the end of each month, 2020-2024

(monthly figures)

Legend: DWDM · Microonda · PON/AON/Ethernet/+ · SDH
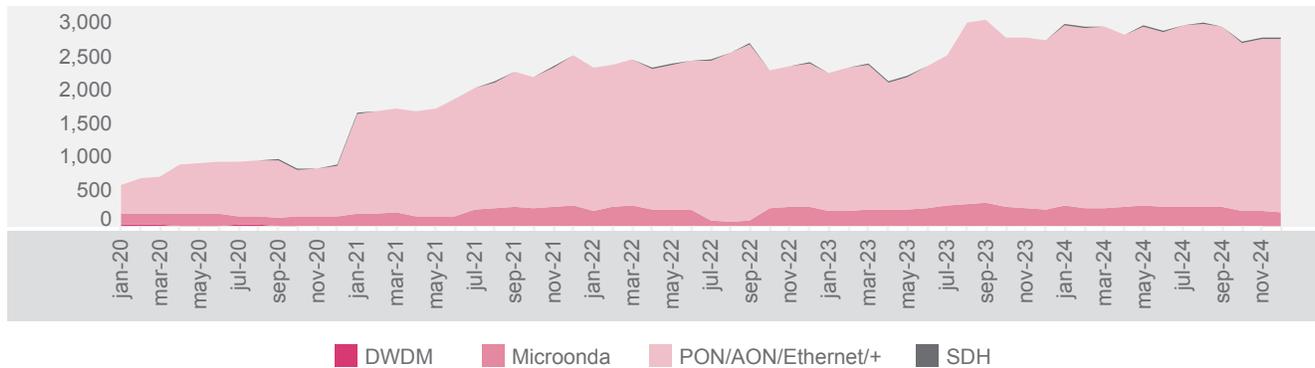
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 169. COSTA RICA: Wholesale Internet connections, percentage distribution by technology, at the end of the year, 2020-2024

(figures in percentage terms)

2020	2021	2022	2023	2024
0.76 %	0.27 %	0.25 %		0.50 %
82.5 %	87.6 %	88.0 %	90.9 %	91.9 %
15.7 %	11.6 %	11.6 %	8.8 %	7.4 %
1.1 %	0.5 %	0.2 %	0.3 %	0.2 %

Legend: DWDM · Microonda · PON/AON/Ethernet/etc · SDH
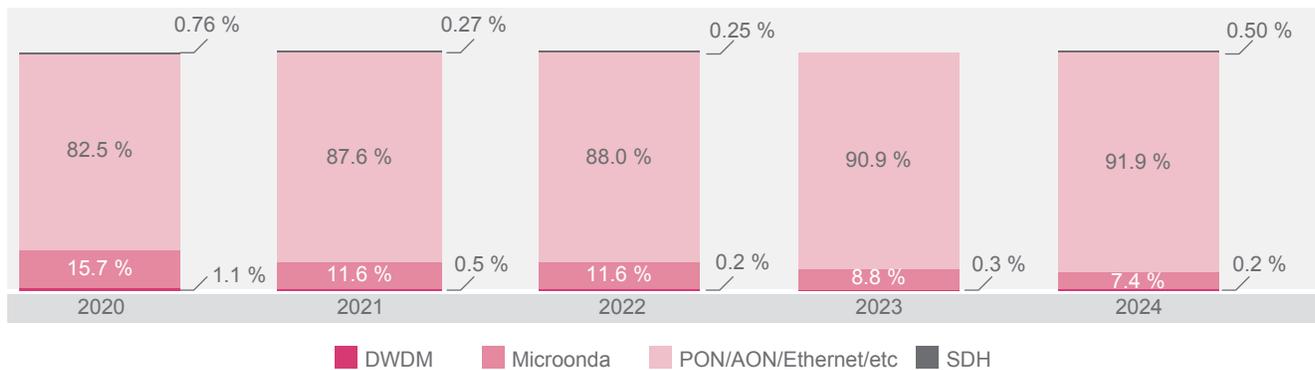
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 170. COSTA RICA: Percentage of wholesale Internet access connections per speed range (year-end) in 2020-2024

(figures in percentage terms)

2020	2021	2022	2023	2024
7.1 %	2.8 %	2.7 %	2.7 %	2.6 %
11.2 %	9.3 %	11. %	11.2 %	9.9 %
39.7 %	51.3 %	53.6 %	57.2 %	57.6 %
42. %	36.6 %	32.7 %	28.9 %	29.9 %

Legend: Up to 10 Mbps · From 10 Mbps to 100 Mbps · From 100 Mbps to 1 Gbps · From 1 Gbps to 600 Gbps
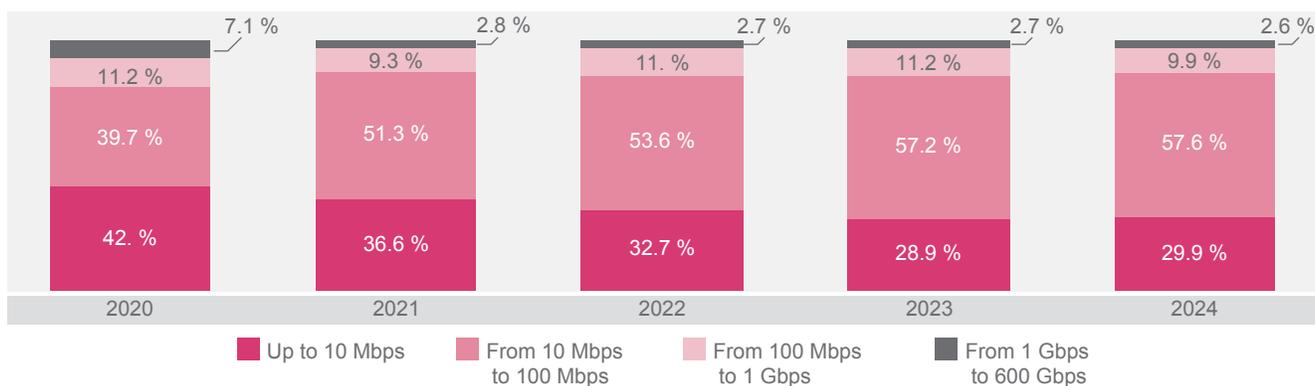
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 171. COSTA RICA: Total revenue from wholesale Internet access (year-end) in 2020-2024

(figures in millions of colones)

2020	2021	2022	2023	2024
8,887	11,337	10,431	11,166	9,990
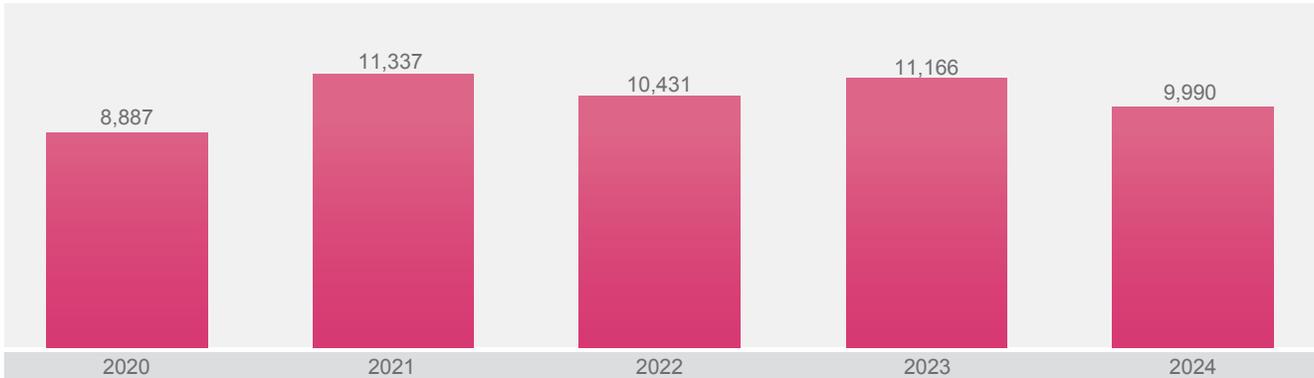
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 172. COSTA RICA: Revenue from wholesale Internet access per quarter in 2020-2024

(figures in millions of colones)

	I T	Q2	Q3	Q4
2020	2,297	1,880	2,237	2,474
2021	2,923	2,773	2,857	2,783
2022	2,840	2,398	2,780	2,413
2023	2,828	3,049	2,408	2,880
2024	2,649	2,671	2,346	2,324
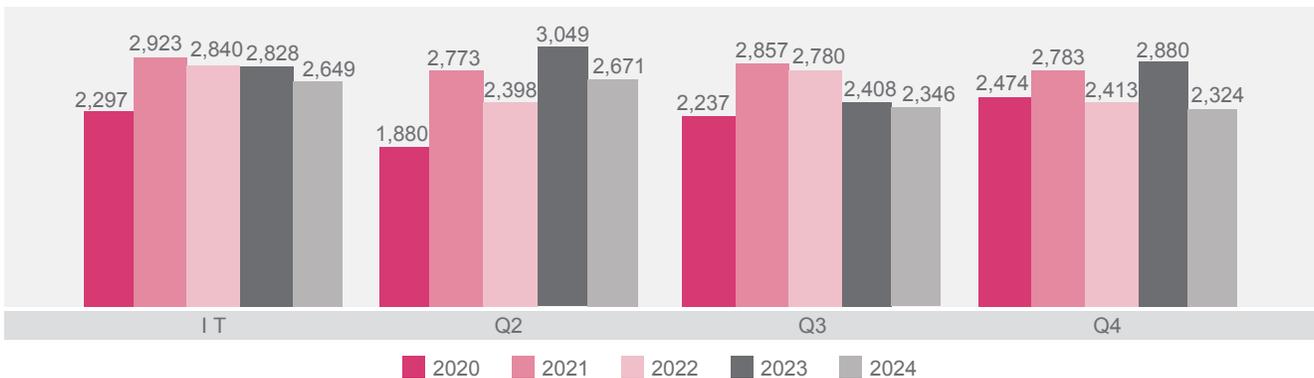
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 173. COSTA RICA: Revenue from wholesale Internet access per type of technology by month in 2020-2024

(figures in colones)

DWDM   SDH/Microwave   PON/AON/Ethernet/+
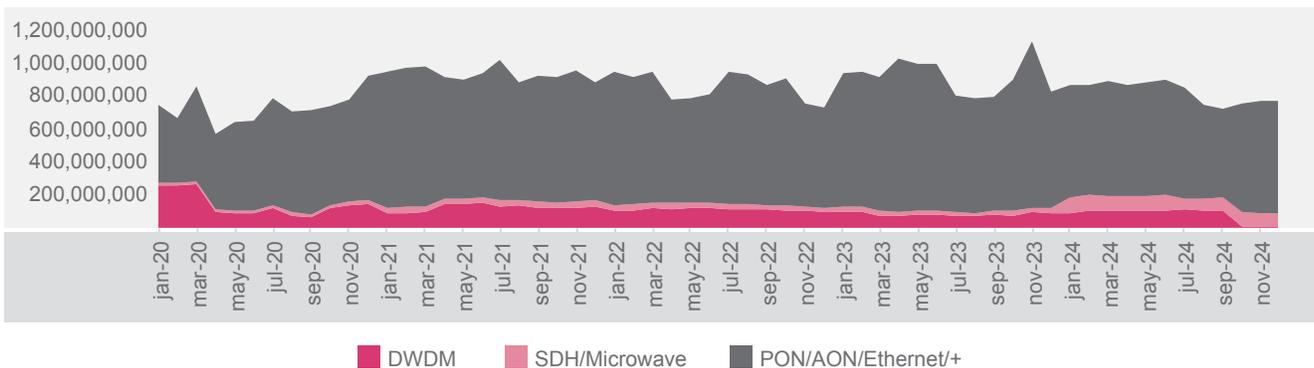
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 174. COSTA RICA: Percentage distribution of revenue from wholesale Internet access per type of technology (year-end) in 2020-2024

(figures in percentage terms)

	2020	2021	2022	2023	2024
PON/AON/Ethernet/+	78.6 %	82.8 %	83.1 %	88.0 %	79.7 %
SDH/Microwave	2.5 %	3.8 %	3.8 %	2.9 %	10.2 %
DWDM	18.9 %	13.4 %	13.0 %	9.0 %	10.1 %

■ DWDM   ■ SDH/Microwave   ■ PON/AON/Ethernet/+
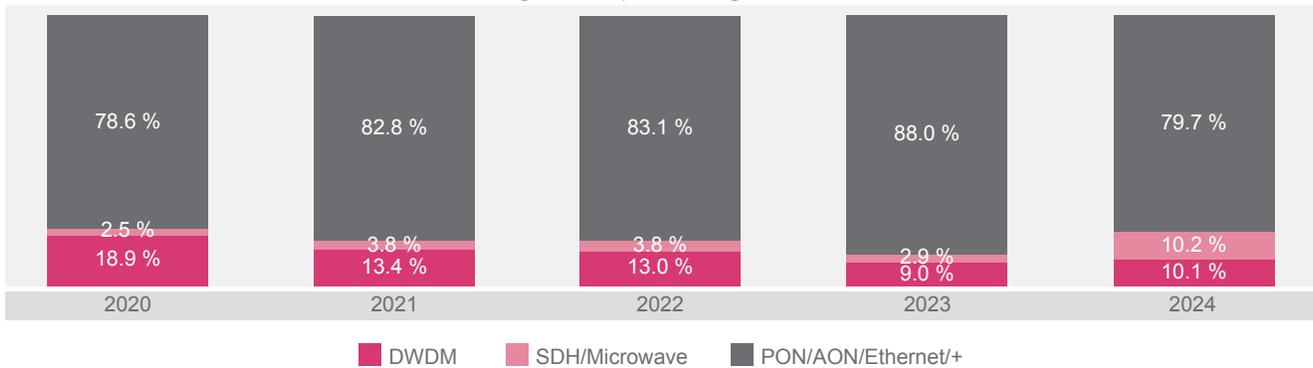
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 175. COSTA RICA: Total yearly revenue from wholesale Internet access per speed range in 2020-2024

(figures in percentage terms)

	2020	2021	2022	2023	2024
From 1 Gbps to 600 Gbps	36 %	50.4 %	31.1 %	21.1 %	28.1 %
From 100 Mbps to 1 Gbps	12.1 %	14.2 %	47.5 %	37.2 %	20.9 %
From 10 Mbps to 100 Mbps	21 %	17.9 %	17.7 %	33.6 %	39.2 %
Up to 10 Mbps	30.9 %	17.6 %	3.7 %	8.1 %	11.8 %

■ Up to 10 Mbps   ■ From 10 Mbps to 100 Mbps   ■ From 100 Mbps to 1 Gbps   ■ From 1 Gbps to 600 Gbps
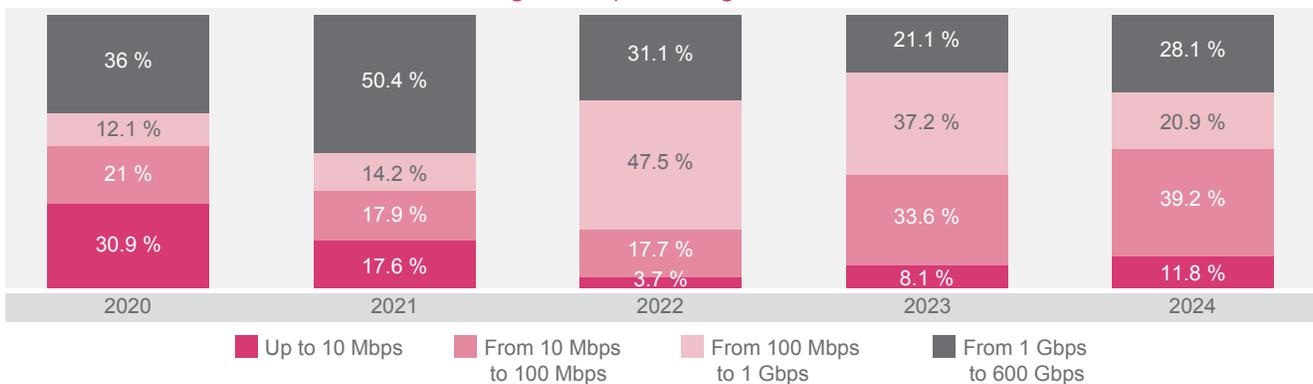
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

DEDICATED LINES

Dedicated lines, also known as leased lines, are communication links that can have a point-to-point configuration (in shops and offices) and a point-to-multipoint configuration (for certain business services and wholesale connections).

Dedicated lines provide a guaranteed bandwidth and ensure that clients receive a consistent and stable level of quality. This means that the bandwidth is reserved for the exclusive use of the client and is not shared with other users.

Dedicated lines are mainly used to transmit data securely and privately through logical or physical media. Additionally, clients are able to select custom packages that are tailor-made to satisfy specific needs (i.e.: latency, bandwidth, maintenance, support, and availability, among others).

At the end of 2024, the dedicated line market in Costa Rica had 33 active operators, maintaining the same figure as in 2023, but with a 3.3 % increase in the total number of connections, which rose from 19,453 to 20,089. Of these connections, the operators ICE (Kölbi), Ufinet, Millicom (TIGO), Telecable, Itellum, RACSA, and REICO account for 90 % of total connections.

In terms of revenue, a cumulative total of 42,623 million colones was reported for the same period, of which ICE (Kölbi), Ufinet, Itellum, Millicom (TIGO), Cirion, Telecable, and AT&T account for 90 % of total revenue. This amount represents an increase of 4.5 % compared to 2023, when revenue was 40,531 million colones.

> ## At the end of 2024, the dedicated line market in Costa Rica had 33 active operators

Connections

Graph No. 176 shows the number of companies participating in the dedicated lines market during the 2020-2024 period, highlighting that, at the end of 2023, a total of 33 operators were actively participating. For its part, Graph No. 177 details the total number of connections in the same period, reaching 20,089 connections in 2024, reflecting a negative annualized growth rate of 4 % (2020-2024 period), although with a positive variation of 3.3 % compared to 2023.

In terms of quarterly variation, Graph No. 178 shows the behavior between 2023 and 2024. There is a percentage variation of 11.8 % in the first quarter, followed by 3.4 % in the second quarter, 40 % in the third quarter, and finally an increase of 3.3 % in the fourth quarter.

Graph No. 179 shows the percentage distribution of connections by market type in each quarter of 2024. At the end of the fourth quarter, 67 % of connections corresponded to the retail market, while 33 % were directed to the wholesale market.

Graph No. 180 shows the distribution of connections by service provision territory, where at the end of the fourth quarter, 98 % of connections were domestic, while only 2 % were international.

In the analysis of the wholesale market in Graph No. 181, 97 % of connections were concentrated in the national territory, while the remaining 4 % were in the international territory. The retail market showed similar behavior, as can be seen in Graph No. 182, where 99 % of connections are provided in the national territory.

Graph No. 183 shows the analysis of the distribution of connections by speed. It can be seen that speed ranges up to 100 Mbps represent 92 % of total connections, highlighting a significant concentration at lower speed levels, reflecting a clear preference or demand for connections within those defined ranges.

Graph No. 184 details the percentage distribution of connections by technology. At the end of 2024, VPNs accounted for 35 %, Digital Links for 34 %, and the Ports/Others/Analog/Frames group for 38 %. Noteworthy is the remarkable growth in Digital Link technology, which experienced a 35 % increase compared to 2023, rising from 5,071 to 6,863 connections.

Finally, Graph No. 185 shows the quarterly distribution of connections by technology in 2024. At the end of the fourth quarter, 34.8 % of subscriptions corresponded to Ports/Others/Analog/Frames, 34.2 % to VPN, and 31 % to Digital Links.

Analysis of the connections reveals a clear preference for speeds of up to 100 Mbps, which can be interpreted as high demand for affordable options that meet basic connectivity needs in both the retail and wholesale markets. In addition, most connections are concentrated at the national level, reflecting the importance of offering services that meet demand and preferences in the Costa Rican market.

Revenue

Graph No. 186 shows total annual revenue for the 2020-2024 period, highlighting that in 2024, revenue reached 42,623 million colones, representing an increase of 4.5 % over the previous year. Meanwhile, a negative annualized growth rate of 4 % is estimated for revenues generated by dedicated lines.

Graph No. 187 compares quarterly revenues between 2023 and 2024, showing both positive and negative variations throughout the year. In the first quarter, revenue decreased by 3.1 %, followed by a 5.6 % reduction in the second quarter. However, the third quarter saw a significant increase of 36 %, contrasting with a 7.4 % decline in the fourth quarter compared to the same period in the previous year.

Graph No. 188 shows the distribution by market type of quarterly revenues in 2024. In the fourth quarter, 53.3 % of revenues came from the retail market, while 46.7 % came from the wholesale market.

Graph No. 189 provides a detailed analysis of the quarterly distribution of revenues by service territory in 2024. At the end of the fourth quarter, 86.6 % of revenues came from services offered in the domestic market, while 13.4 % were generated from international services. This pattern follows the same trend observed in 2023, where most of the revenues were also concentrated in the domestic market.

Along the same lines, Graph No. 190 details the composition of wholesale market revenues by territory, showing that 83.4 % of revenues were generated by services provided in the national territory, while 16.6 % came from international services.

Furthermore, Graph No. 191 shows the distribution of retail market revenues by territory, where 93.2 % of revenues were generated within the domestic market and the remaining 6.8 % came from services offered internationally.

Graph No. 192 illustrates the distribution of monthly revenue by connection speed during 2024, providing a detailed view of how revenue is distributed according to different speed ranges. It can be seen that the range of more than 600 Mbps represents 24 % of total revenue, standing out as one of the segments with the highest contribution.

On the other hand, speed ranges up to 100 Mbps account for 66 % of total revenue, reflecting the predominant preference and demand for connections in these ranges. This trend shows that, despite the growth in higher speeds, most revenue comes from connections with more moderate capacities, which could indicate greater accessibility and adoption in the demand for these ranges within the market.

Moreover, Graph No. 193 analyzes the annual variation in revenue by connection technology for the 2023-2024 period , showing a 6.2 % drop in revenue generated by VPNs and a 19.5 % decrease in the Ports/Others/Analog/Frames group. In contrast, Digital Links experienced significant growth of 57.4 %, standing out as the segment with the largest increase in revenue.

Graph No. 194 shows the distribution of quarterly revenues by technology platform during 2024, highlighting that in the fourth quarter, 39.7 % came from Digital Links, 30.2 % from VPNs, and 30.1 % from Ports/Others/Analog/Frames, showing a relatively balanced distribution among these technologies for this last quarter.

In terms of revenue, 2024 has been a positive year, with an increase of 4.5 % over the previous year, highlighting the market's position in terms of revenue generation. This growth has been mainly driven by the domestic market, with a significant share from the retail sector. For their part, Digital Link technologies have shown remarkable growth, indicating a shift towards this type of technology that responds to the evolution of customer needs.

It is concluded that dedicated line service is essential to ensure a stable, secure, and exclusive communication connection for users, whether in a business, wholesale, or retail context. It is characterized by reserved data transmission capacity, which ensures consistent quality of service. As detailed above, in recent years, the dedicated line market has shown growth in terms of connections and revenue.

GRAPH 176. COSTA RICA: Number of dedicated line connections and active companies in 2020-2024
(yearly figures)
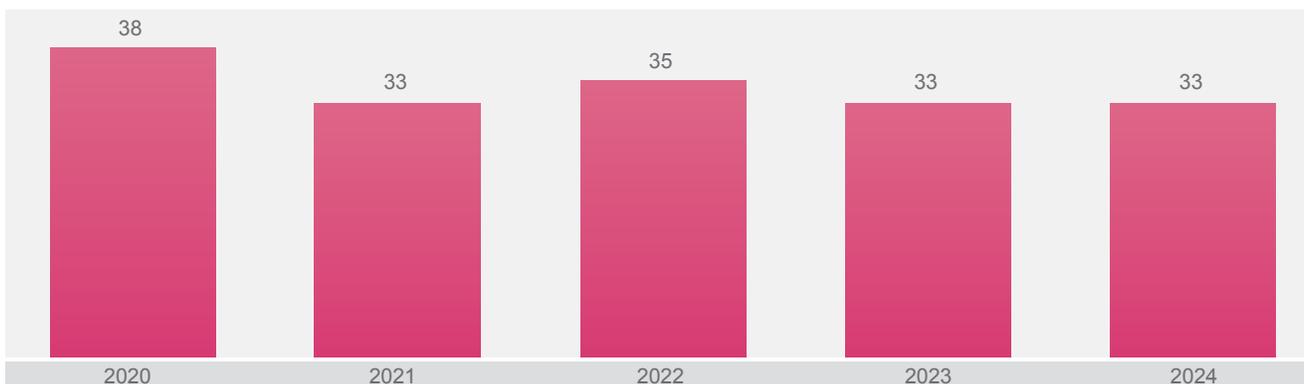
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 177. COSTA RICA: Number of dedicated line connections in 2019-2023
(yearly figures)

2020	2021	2022	2023	2024
23,665	18,625	18,140	19,454	20,089
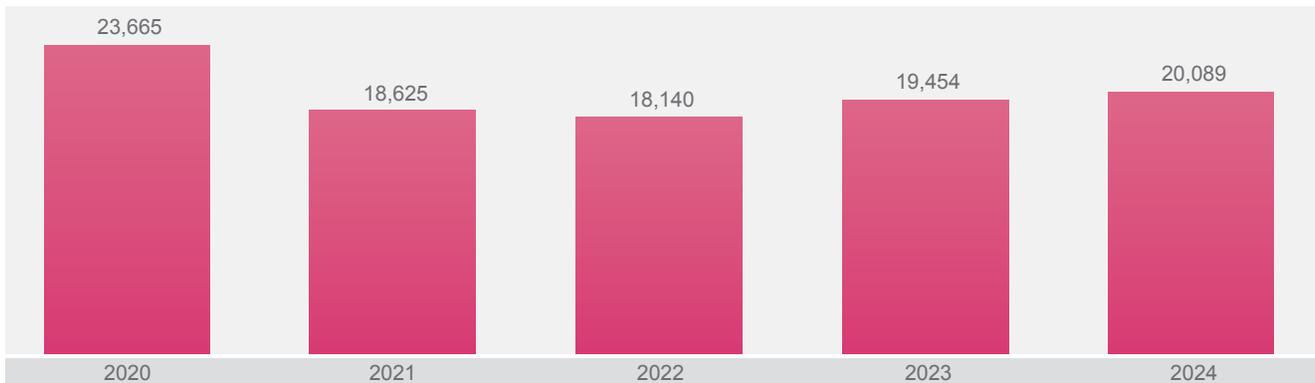
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 178. COSTA RICA: Number of dedicated line connections in 2023-2024
(quarterly figures)

	I Q1	Q2	Q3	Q4
2023	17,540	19,825	19,454	19,454
2024	19,613	20,508	27,242	20,089

■ 2023 ■ 2024

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 179. COSTA RICA: Number of dedicated line connections per market in 2024
(quarterly figures in percentage terms)

	Q1	Q2	Q3	Q4
Retail market	71.7 %	69.8 %	71.3 %	67.0 %
Wholesale market	28.3 %	30.2 %	28.7 %	33.0 %

■ Wholesale market ■ Retail market

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 180. COSTA RICA: Number of dedicated line connections per territory in 2024
(quarterly figures in percentage terms)

	Q1	Q2	Q3	Q4
Domestic	98.0 %	98.0 %	98.6 %	98.1 %
International	2.0 %	2.0 %	1.4 %	1.9 %

- International
- Domestic
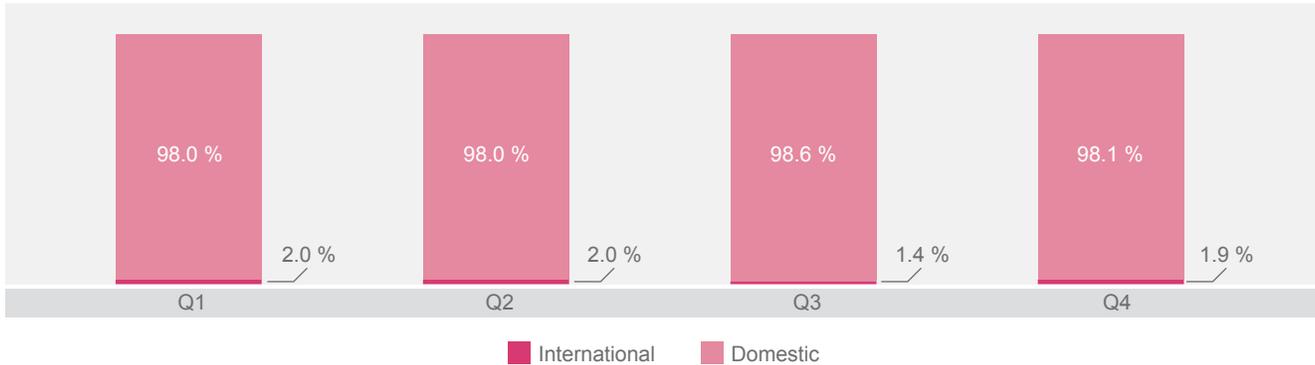
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 181. COSTA RICA: Number of dedicated line connections in the wholesale market per territory in 2024
(year-end figures in percentage terms)

3 %
97 %

- DOMESTIC
- INTERNATIONAL
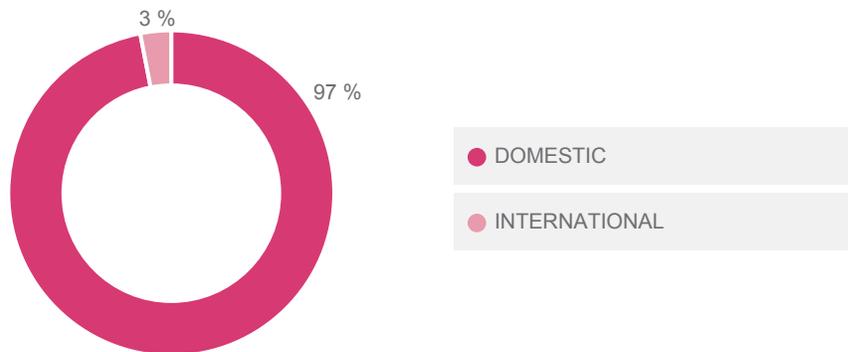
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 182. COSTA RICA: Number of dedicated line connections in the retail market per territory in 2024
(year-end figures in percentage terms)

1 %
99 %

- DOMESTIC
- INTERNATIONAL
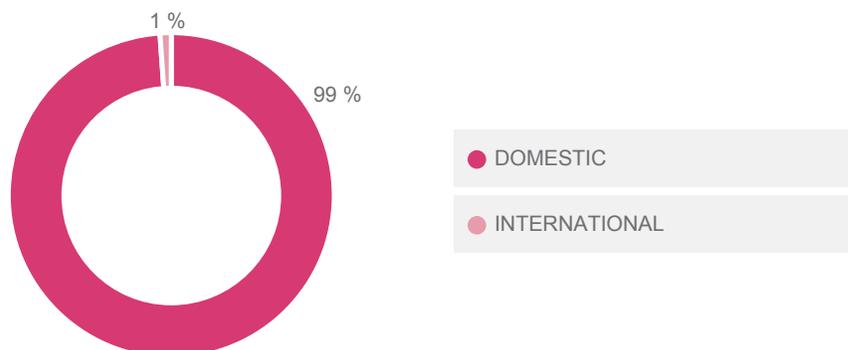
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 183. COSTA RICA: Number of dedicated line connections in the wholesale market per Internet speed in 2024

(monthly figures)

V <= 2 Mbps
2 Mbps < V <= 10 Mbps
10 Mbps < V <= 30 Mbps
30 Mbps < V <= 100 Mbps
100 Mbps < V <= 250 Mbps
250 Mbps < V <= 600 Mbps
V < 600 Mbps
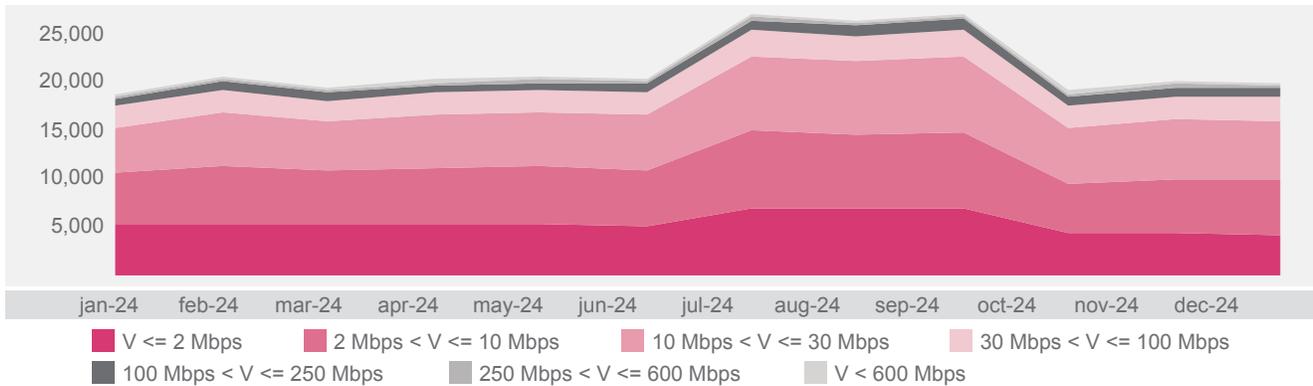
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 184. COSTA RICA: Number of total dedicated line connections per type of technology in 2023-2024

(yearly figures)

VPN: 6,709 (2023), 7,000 (2024)
Digital Links: 5,071 (2023), 6,863 (2024)
Ports/Others/Analog/Frames: 7,674 (2023), 6,226 (2024)

2023   2024
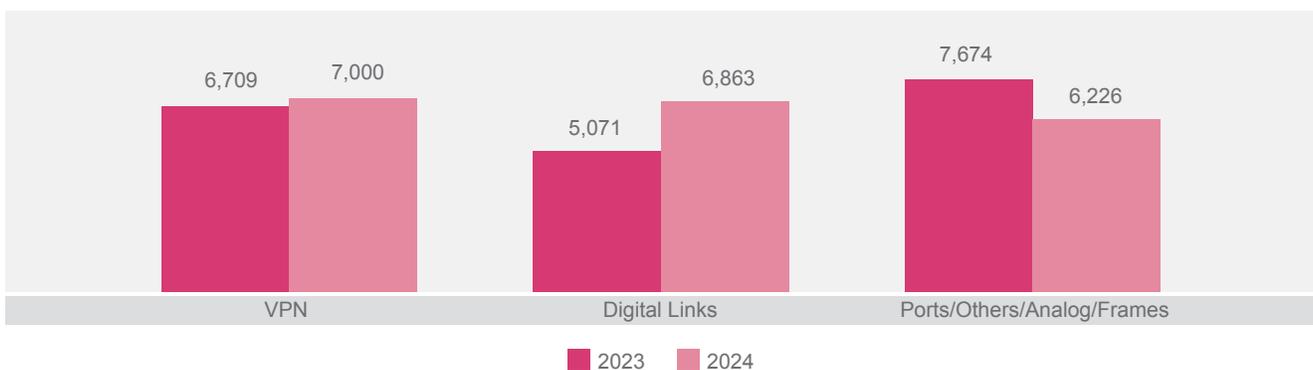
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 185. COSTA RICA: Number of total dedicated line connections per type of technology in 2024

(Quarterly figures)

	Q1	Q2	Q3	Q4
Ports/Others/Analog/Frames	27.7 %	28.5 %	27.6 %	31.0 %
Digital Links	35.3 %	35.8 %	26.3 %	34.2 %
VPN	37.0 %	35.7 %	46.1 %	34.8 %

VPN   Digital Links   Ports/Others/Analog/Frames
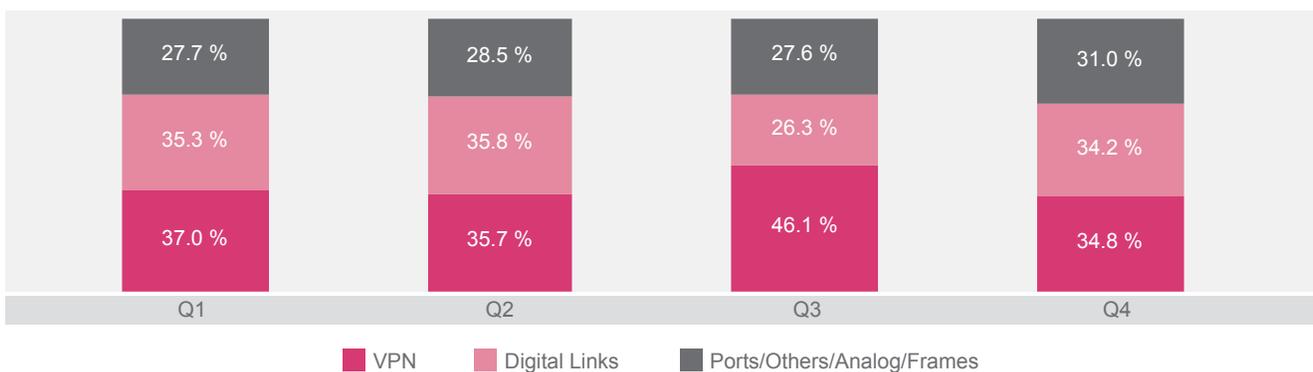
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 186. COSTA RICA: Revenue from dedicated lines in 2020-2024
(yearly figures in millions of colones)

Year	Revenue
2020	50,216
2021	53,901
2022	46,043
2023	40,780
2024	42,623
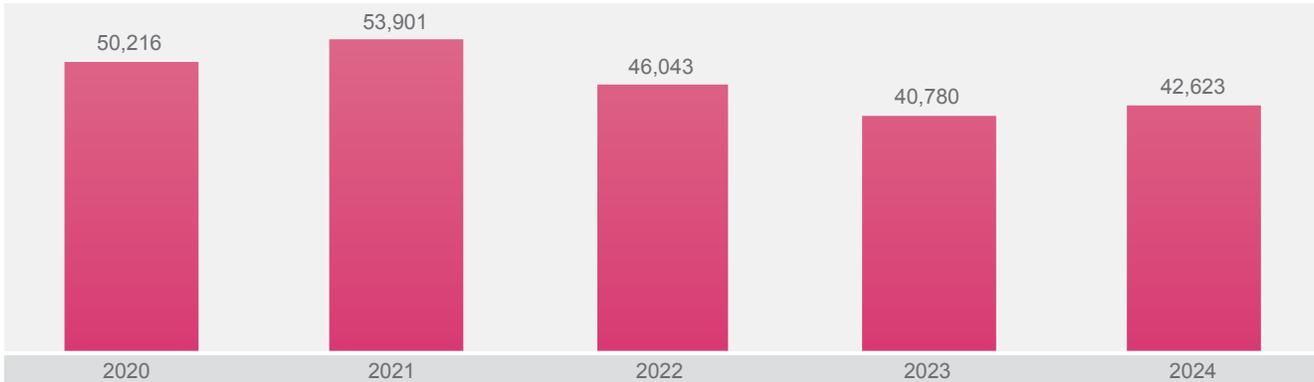
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 187. COSTA RICA: Revenue from dedicated lines in 2023-2024
(quarterly figures in millions of colones)

Quarter	2023	2024
Q1	10,783	10,450
Q2	9,824	9,276
Q3	9,705	13,196
Q4	10,468	9,699
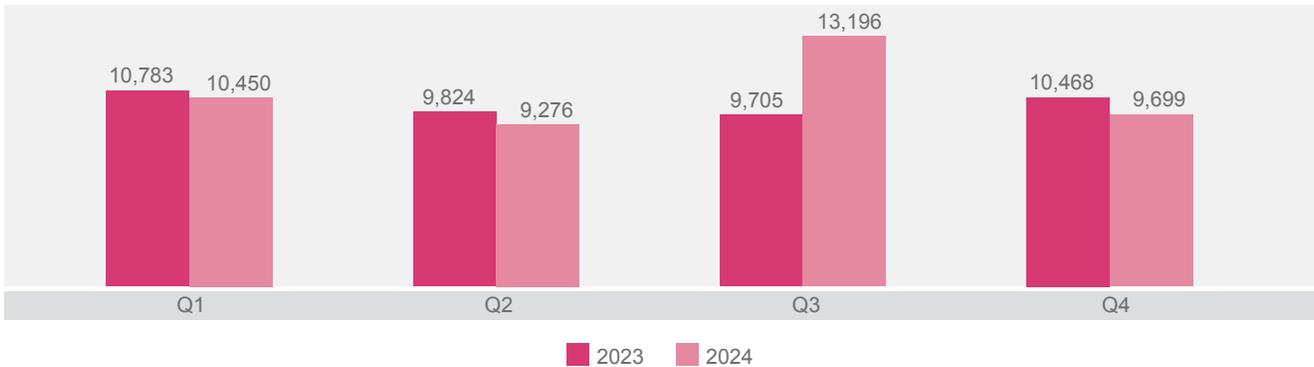
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 188. COSTA RICA: Revenue from dedicated lines per market in 2024
(quarterly figures in percentage terms)

Quarter	Wholesale market	Retail market
Q1	38.4 %	61.6 %
Q2	37.7 %	62.3 %
Q3	34.2 %	65.8 %
Q4	46.7 %	53.3 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 189. COSTA RICA: Revenue from dedicated lines per territory in 2024

(quarterly figures in percentage terms)

	Q1	Q2	Q3	Q4
Domestic	83.8 %	94.9 %	91.9 %	86.6 %
International	16.2 %	5.1 %	8.1 %	13.4 %

■ International   ■ Domestic
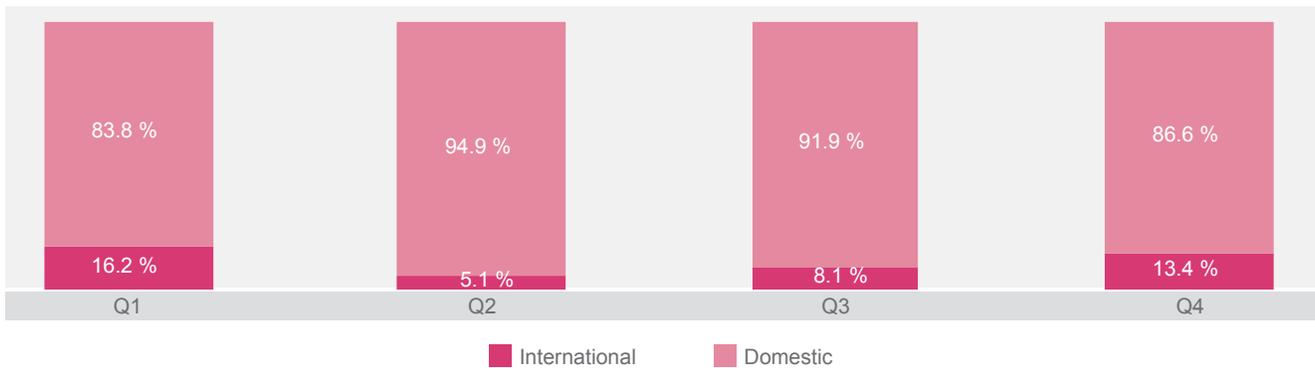
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 190. COSTA RICA: Revenue from dedicated lines in the wholesale market per territory in 2024

(year-end figures in percentage terms)

16.6 %
83.4 %

● DOMESTIC

● INTERNATIONAL
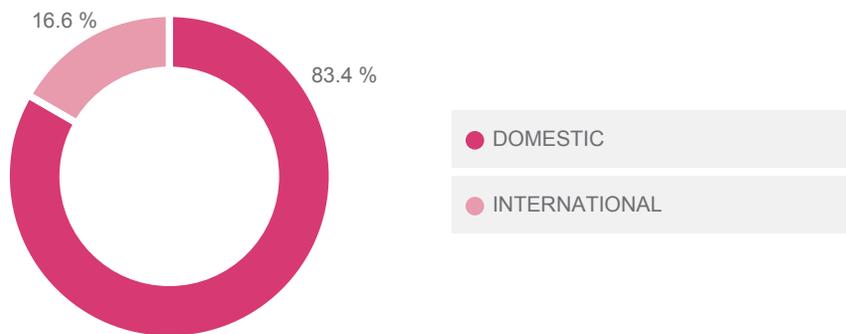
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 191. COSTA RICA: Revenue from dedicated lines in the retail market per territory in 2024

(year-end figures in percentage terms)

6.8 %

93.2 %

● DOMESTIC

● INTERNATIONAL
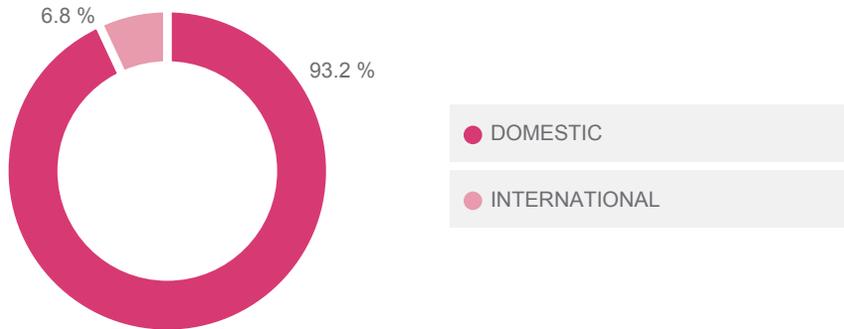
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 192. COSTA RICA: Dedicated lines revenue, distribution by speed, 2024

(monthly figures in millions of colones)

jan-24 feb-24 mar-24 apr-24 may-24 jun-24 jul-24 aug-24 sep-24 oct-24 nov-24 dec-24

■ V <= 2 Mbps ■ 2 Mbps < V <= 10 Mbps ■ 10 Mbps < V <= 30 Mbps ■ 30 Mbps < V <= 100 Mbps
■ 100 Mbps < V <= 250 Mbps ■ 250 Mbps < V <= 600 Mbps ■ V < 600 Mbps
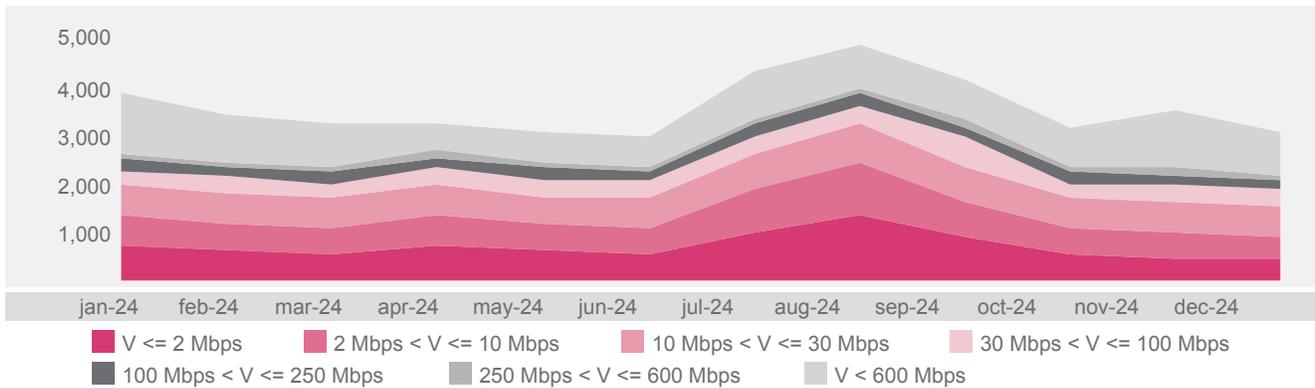
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 193. COSTA RICA: Total revenue from dedicated lines per type of technology in 2023-2024

(yearly figures in millions of colones)

	2023	2024
VPN	17,710	16,614
Digital Links	9,672	15,222
Ports/Others/Analog/Frames	13,398	10,786
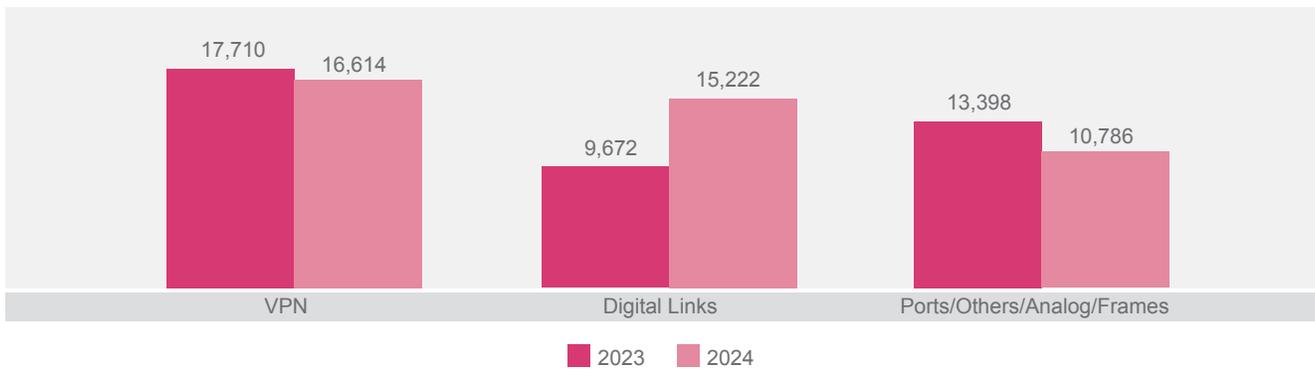
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 194. COSTA RICA: Total revenue from dedicated lines per type of technology in 2024

(quarterly figures in percentage terms)

	Q1	Q2	Q3	Q4
Ports/Others/Analog/Frames	27.2 %	23.6 %	21.5 %	30.1 %
Digital Links	33.5 %	39.0 %	32.2 %	39.7 %
VPN	39.3 %	37.4 %	46.3 %	30.2 %
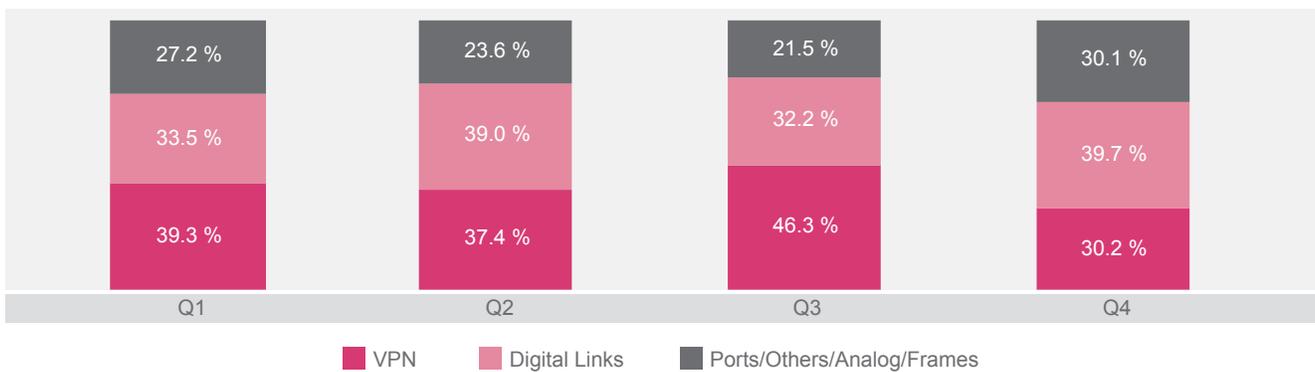
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

SUBSCRIPTION
TELEVISION

As of December 2024, subscription television services are marketed by a total of 26 operators and providers. Considering that this service is mainly provided in three formats and that a service provider can offer it in several of these formats, its distribution by technology is as follows: cable subscription television (20 providers), wireless subscription television, including satellite (3 providers), and finally, 12 companies offering subscription television services over IP protocol (IPTV).

Subscriptions

As shown in Graph No. 195, a total of 798,828 pay TV subscriptions were reported in 2024, which represents a decrease of 2 % (20,236 subscriptions) in relation to the previous year.

In terms of year-on-year performance, when comparing each quarter of 2024 with the same quarter of 2023, based on total subscriptions broken down by quarter, the trend is similar to that seen in the analysis of the last six years. In other words, relatively constant growth rates are recorded, with a downward trend of less than 1 % during these periods (see Graph No. 196).

With regard to the distribution of subscriptions by access technology for 2024, the dynamics presented in 2023 remain unchanged, in which the provision of service via coaxial cable continues to dominate the market with 48.2 %, followed by IP television with 36.2 % and finally the remaining 15.6 % for satellite television (see Graph No. 197).

The dynamics of this breakdown by technology during the 2020-2024 period reaffirm the transformation that the service has undergone in the last five years, mainly because coaxial cable service is losing market share, as is wireless television, and there continues to be a steady increase in the share of subscription television over IP (see Graph No. 198).

In this regard, as noted in previous reports, over the last five years, television provided over IP has shown steady growth, both in the number of subscribers and in the number of operators offering this technology. Table No. 15 shows the sustained increase in subscriptions to this technology since 2020, in absolute terms with 195,355 (208 %) subscriptions compared to 2024 and 49,767 (21 %) between 2023 and 2024.

Taking into account that more than 80 % of subscription television service operators are also providers of other telecommunications services, they can offer subscription television bundled with other services, such as Internet and fixed telephony. Graph No. 199 combines total fixed Internet service subscriptions and IP television service subscriptions, revealing the convergence of services and the increase in the number of new subscriptions and revenues from this technology.

The pay TV penetration rate dropped to 15.1 % of the total population in 2024. In turn, the ratio between the total number of subscriptions to pay TV services and the number of households in 2024 shows a total of 44 subscriptions per 100 households (see Graphs No. 200 and No. 201).

In relation to the level of market concentration associated with pay TV services, the Herfindahl-Hirschman Index (HHI)[29] estimate for 2024 shows a decrease of 39 points to a value of 1821, indicating that there are still no significant structural changes. As the estimate is below 3000 points but above 1500, the subscription television market is a non-concentrated market[30] (see Graph No. 202).

29   See the definition provided in the "Methodology" section of this report.
30   Resolution RCS-082-2015 states that a market with an HHI of 3000 or greater is highly concentrated.

Revenue

Revenues generated in 2024 from the provision of subscription television services amounted to 156,093 million colones, representing a decrease of 7,938 million colones in absolute terms and a year-on-year decrease of 1 % compared to 2020. From 2023 to 2024, they decreased by 6 %, which implies a decrease of 10,786 million colones (see Graph No. 203).

On the behavior of revenues broken down by quarter, for 2023, average quarterly revenue amounts to 41,720 million colones, with an average quarterly variation rate of 1 %, and for 2024, this same statistic was 39,023 million colones and a negative average quarterly variation rate of 2 % (see Graph No. 204).

Considering the percentage distribution of revenue by technology and consistent with the distribution of subscriptions, the distribution of revenue confirms the predominance of the service provided by coaxial cable. However, as in the case of subscriptions, this modality shows a decrease for the last year. In 2024, 61 % of total revenue was generated by coaxial cable service, followed by IP and multipoint service with 25 %, and the remaining 14 % corresponding to satellite service (see Graph No. 205).

In this regard, when analyzing the percentage composition of revenue for the 2020-2024 period, it can be confirmed that revenue associated with television service has also undergone a percentage redistribution. This can be seen in Graph No. 206, which shows a decrease in the percentage share of revenue associated with coaxial cable service, from 66 % in 2020 to 61 % in 2024. Similarly, satellite technology goes from 25 % to 14 % in the same period.

This contrasts with other technologies (IPTV and MMDS-multichannel multipoint), which show a growing trend, rising from 9 % in 2020 to 24 % in 2024, considering that most of them are operators of both subscription television services and other telecommunications services such as Internet and fixed telephony; so that they can offer these services in bundled packages.

Table No. 16 shows the breakdown of the aforementioned revenue associated with the service in absolute terms. Specifically for the 2020-2024 period , it can be seen that revenue from coaxial cable service decreased by 14,258 million colones, and revenue from satellite service also decreased by 17,920 million colones. Alternatively, the revenue from IPTV services increased by 24 300 million colones during that same period.

As for the differences between 2023 and 2024 for these technologies, coaxial cable service and satellite television service saw their revenues decrease by 6,369 million colones (6 %) and 5,840 million colones (21 %), respectively. In contrast, IPTV increased its revenue by 1,423 million colones (4 %).

Finally, in relation to the average revenue per subscriber for the service in general, by 2024 this will decrease to 16,284 colones (695 colones less than the previous year), representing a 4 % decrease compared to 2023. This indicator continues to show uneven performance for 2024 compared to 2023. In other words, the average revenue per subscriber for cable service increases by approximately 763 colones, while both satellite and IPTV decrease by 413 and 1,844 colones, respectively (see Graph No. 207 and Table No. 17).

> **In 2024, there will be 798,828 subscriptions, representing a decrease of 2 %**

GRAPH 195. COSTA RICA: Total pay TV subscriptions in 2020-2024
(yearly figures)

Year	Subscriptions
2020	866,593
2021	848,950
2022	831,579
2023	819,064
2024	798,828
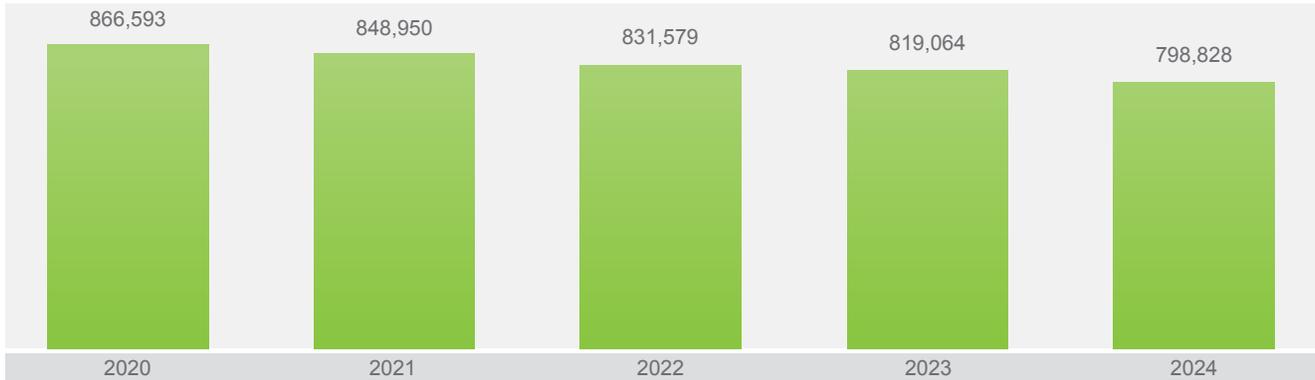
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 196. COSTA RICA: Pay TV subscriptions by quarter, 2023–2024
(yearly figures)

Quarter	2023	2024
Q1	838,772	806,026
Q2	821,976	803,458
Q3	811,184	788,035
Q4	819,064	798,828
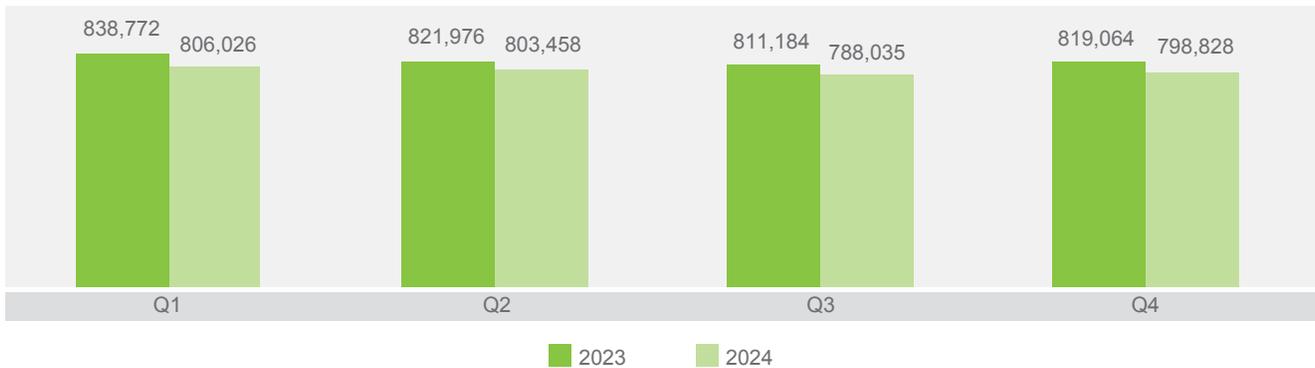
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 197. COSTA RICA: Percentage of pay TV subscriptions per type of technology in 2024

- Cable TV: 48.2 %
- PTV & Multipoint (MMDS): 36.2 %
- Satellite TV: 15.6 %
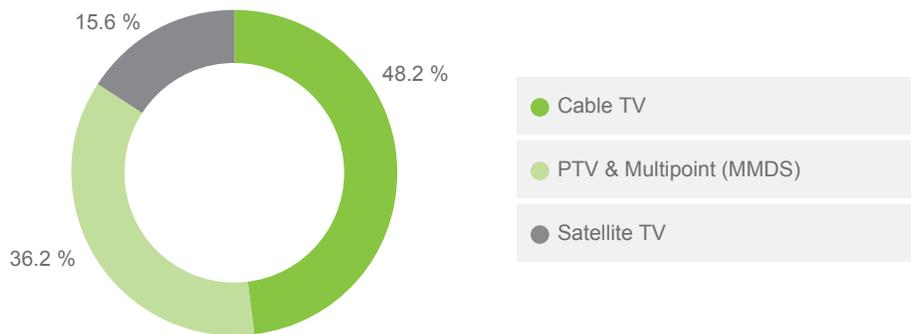
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 198. COSTA RICA: Evolution of the market share of pay TV subscriptions per type of technology in 2020-2024
(figures in percentage terms)

Year	PTV & Multipoint (MMDS)	Satellite TV	Cable TV
2020	63 %	26 %	11 %
2021	60 %	23 %	17 %
2022	55 %	22 %	23 %
2023	52 %	19 %	29 %
2024	48 %	16 %	36 %
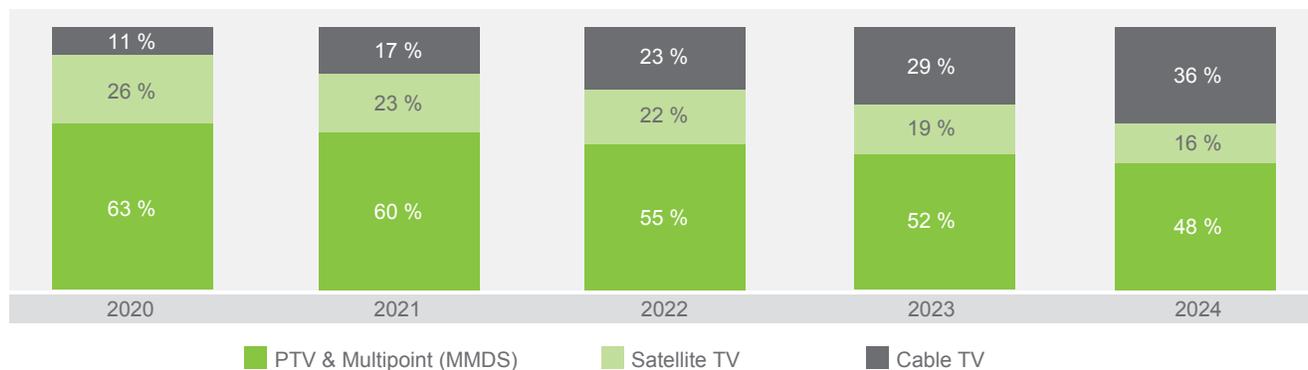
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 15. COSTA RICA: Total pay TV subscriptions per type of technology in 2020-2024
(yearly figures)

Technology	2020	2021	2022	2023	2024
Cable television	548,052	506,169	461,208	426,641	384,780
Satellite television	224,465	195,722	177,666	152,759	124,617
IPTV	94,076	14,7059	192,705	239,664	289,431
Terrestrial television broadcast by multipoint distribution	0	0	0	0	0
Total	**866,593**	**848,950**	**831,579**	**819,064**	**798,828**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 199. COSTA RICA: Total fixed Internet and IPTV subscriptions in 2020-2024
(yearly figures)

Year	Fixed Internet	Subscription TV (IPTV)
2020	992,725	94,076
2021	1,058,767	147,059
2022	1,105,670	192,705
2023	1,149,924	239,664
2024	1,194,638	289,431
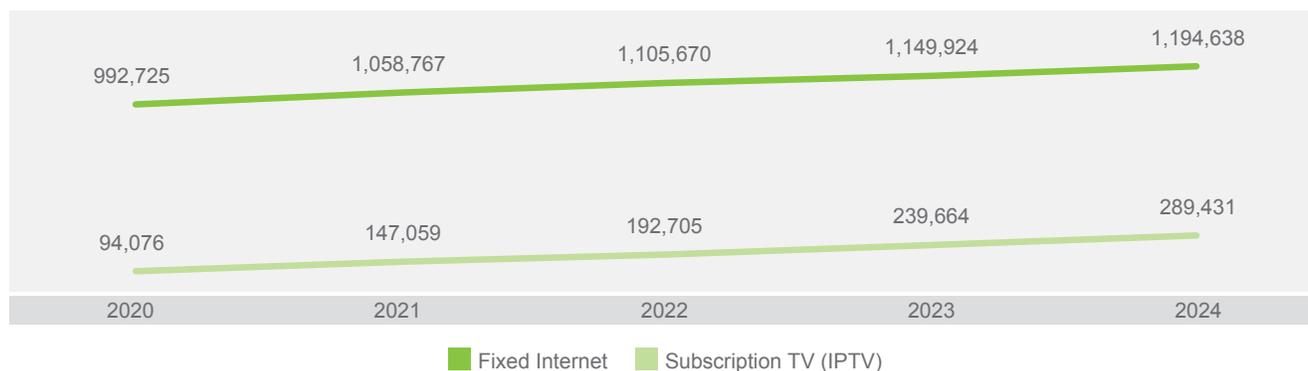
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 200. COSTA RICA: Pay TV subscriptions per 100 inhabitants in 2020-2024
(figures in percentage terms)

2020	2021	2022	2023	2024
17.0 %	16.4 %	16.0 %	15.6 %	15.1 %
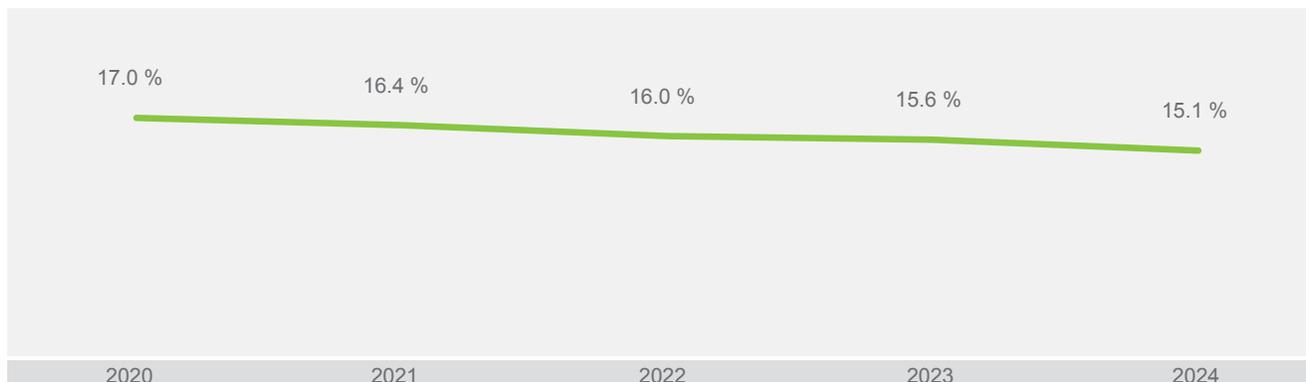
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 201. COSTA RICA: Pay TV subscriptions per 100 households in 2020-2024
(figures in percentage terms)

2020	2021	2022	2023	2024
54.8 %	51.4 %	48.3 %	46.1 %	44.2 %
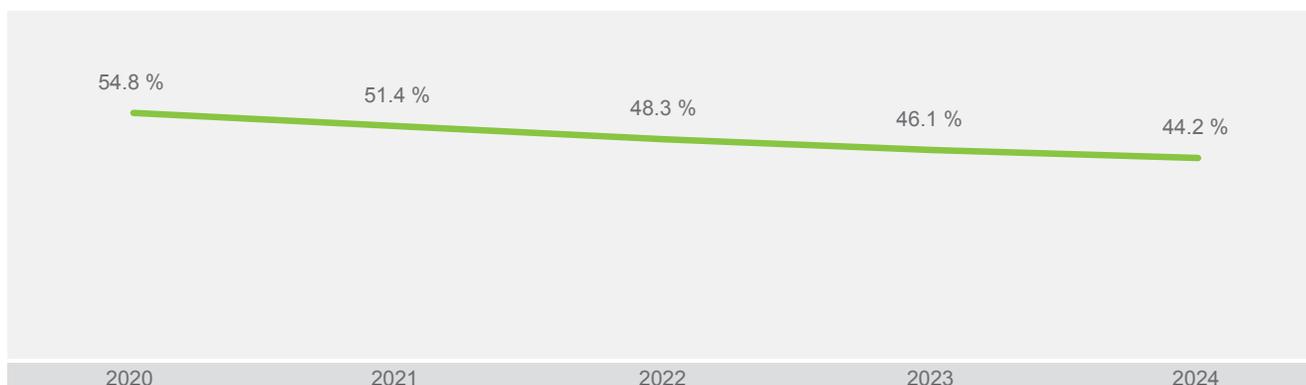
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 202. COSTA RICA: Evolution by year, 2020−2024

2020	2021	2022	2023	2024
1,725	1,819	1,820	1,791	1,821

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 203. COSTA RICA: Total revenue from pay TV subscriptions in 2020-2024
(yearly figures in millions of colones)

Year	Revenue
2020	164,032
2021	164,722
2022	162,371
2023	166,879
2024	156,093
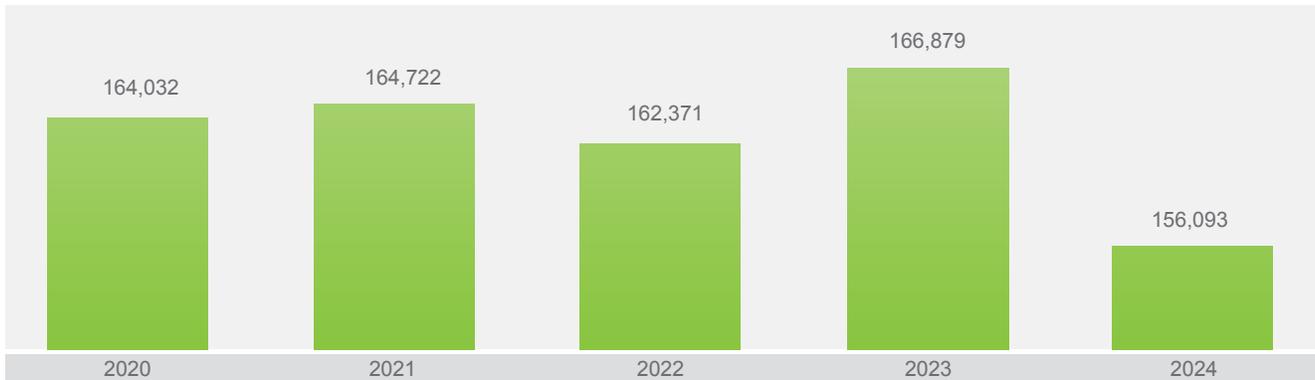
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 204. COSTA RICA: Total revenue from subscription television services by quarter, 2023−2024
(figures in millions of colones)

Quarter	2023	2024
Q1	43,250	40,573
Q2	41,564	39,677
Q3	41,061	38,385
Q4	41,004	37,458
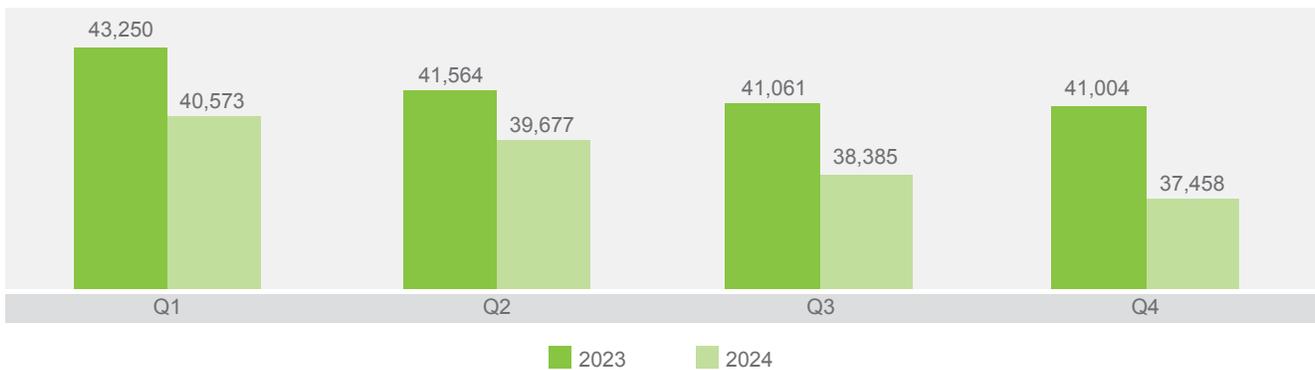
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 205. COSTA RICA: Percentage of revenue from pay TV subscriptions per type of technology in 2024

- 61 % Cable TV
- 25 % PTV & Multipoint (MMDS)
- 14 % Satellite TV
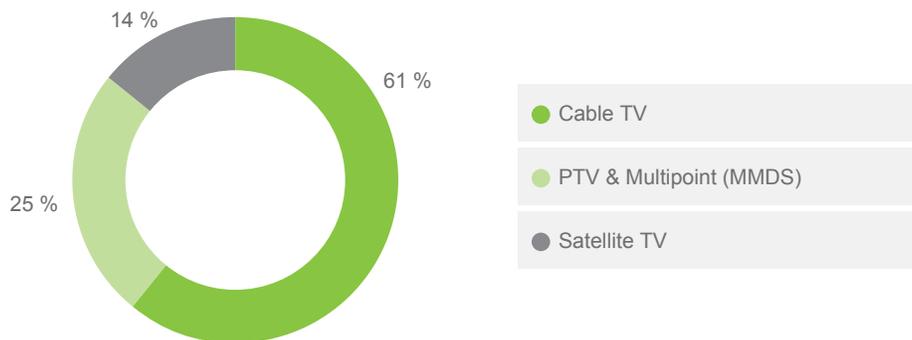
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 206. COSTA RICA: Evolution of the percentage of revenue from pay TV subscriptions per type of technology in 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
PTV & Multipoint (MMDS)	9 %	14 %	21 %	23 %	25 %
Satellite TV	25 %	24 %	21 %	17 %	14 %
Cable TV	66 %	62 %	58 %	60 %	61 %

■ Cable TV ■ Satellite TV ■ PTV & Multipoint (MMDS)
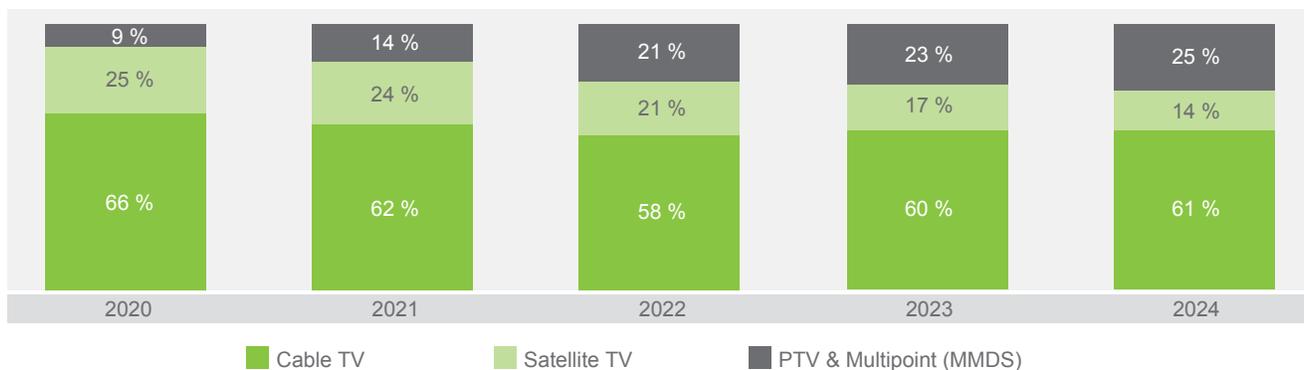
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 16. COSTA RICA: Total revenue from pay TV services by access technology, 2020-2024

(figures in millions of colones)

Technology	2020	2021	2022	2023	2024
Cable television	108,724	101,966	94,309	100,835	94,466
Satellite television	40,428	39,464	33,767	28,349	22,508
IPTV	14,818	23,292	34,295	37,696	39,118
Terrestrial television broadcast by multipoint distribution	61	0	0	0	0
Total	**164,032**	**164,722**	**162,371**	**166,879**	**156,093**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 207. COSTA RICA: Average monthly revenue per subscriber from pay TV subscriptions in 2020-2024

(monthly figures based on quarterly data in colones per subscriber)

2020	2021	2022	2023	2024
15,774	16,169	16,271	16,979	16,284
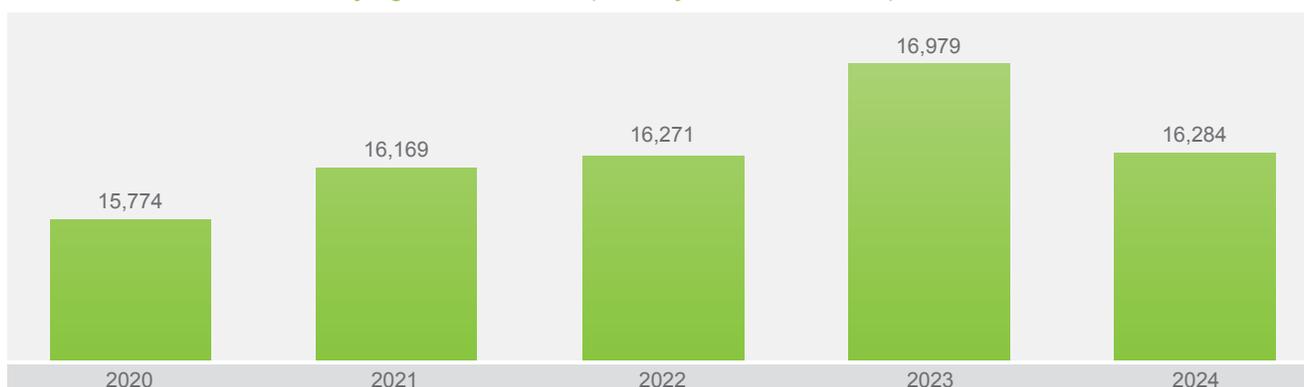
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 17. COSTA RICA: Average revenue per subscriber from pay TV subscriptions in 2020-2024

(yearly figures based on quarterly data in colones per subscriber)

Technology	2020	2021	2022	2023	2024
Cable television	16,532	16,787	17,040	19,696	20,459
Satellite television	15,009	16,803	15,838	15,465	15,052
IPTV	13,126	13,199	14,831	13,107	11,263
Terrestrial television broadcast by multipoint distribution	0	0	0	0	0
Total	**15,774**	**16,169**	**16,271**	**16,979**	**16,284**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

Commercial offers and **prices**

In 2024, the telecommunications market in Costa Rica continued to evolve in terms of the commercial strategies offered by operators. Faced with an increasingly competitive environment, operators have continued to optimize offers, benefits, and conditions to maintain and improve their market presence. The expansion and differentiation of services, together with adaptation to consumer preferences, reflect a dynamic market in which operators seek not only to attract new customers but also to strengthen relationships with existing ones.

Different commercial strategies encourage telecommunications operators and service providers to diversify their marketing strategies, stimulating competition, which translates into service innovation, better prices, and offers.

The data used for this study comes from the *Mi Comparador* web tool[31], which allows for analysis of the offers available in the Costa Rican market in terms of plans, prices, and additional benefits. It is also publicly accessible.

This chapter will address the market from two perspectives: qualitative and quantitative (2023 vs. 2024). The qualitative analysis examines the characteristics of commercial offers, considering the number of options available by type of service, what they include, and how offers have varied in mobile services (voice, messaging, and mobile Internet) in postpaid and prepaid plans, and those corresponding to fixed telecommunications services (fixed Internet, subscription television, and fixed telephony).

The quantitative approach focuses on price trends using indexes developed by SUTEL for mobile telecommunications, fixed Internet, and international calls, as well as analyzing variations in the average prices of bundled services.

COMMERCIAL OFFERS

Commercial offers in the mobile telecommunications market

Mobile telecommunications are mobile telephony services (voice, messages and data) offered under prepaid and postpaid plans. An analysis of how commercial offers have changed over time is presented below.

Prepaid plans

Prepaid plans are offered by the three operators participating in this market:

- Claro CR Telecomunicaciones S. A. (Claro)
- Instituto Costarricense de Electricidad (Kölbi)
- Liberty Telecomunicaciones de Costa Rica LY SA (Liberty Tel)

The databases used in postpaid plans are shown in Annex Tables No. 60 and 61. Between December 2023 and December 2024, the total number of commercial prepaid offers experienced a slight reduction of 2 %, from 108 to 106 plans. However, there was a significant change in the market share of each operator. Claro increased its offers by 11 %, while Kölbi and Liberty Tel reduced their plan options by 13 % and 17 %, respectively.

Claro positioned itself as the operator with the largest number of plans, reaching a 58 % share of the total offering, followed by Liberty Tel with 23 % and Kölbi with 19 %.

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31   "Mi Comparador" is a web tool developed by SUTEL that compares plans and commercial offers for telephony, Internet and television services from different devices; this web tool can be accessed by visiting the following website: https://micomparador.sutel.go.cr/

All three operators continued to offer a wide variety of options in terms of mobile services (i.e.: mobile data, SMS messaging, and voice). In terms of the composition of the plans, 50 % correspond to Internet packages, 21 % to voice-only plans, 19 % to combinations of Internet and voice minutes, and 10 % to SMS messaging packages. The growing preference for mobile Internet access suggests that consumers are prioritizing connectivity over other traditional telecommunications services.

A key aspect of prepaid offers is the inclusion of additional benefits, such as free or limited access to high-demand applications. Most plans include free data consumption for WhatsApp, while other operators have extended partial benefits to platforms such as Instagram, Facebook, X, and Waze. This creates a perception of greater value in the plans without a direct increase in prices.

In terms of composition, offers that include minutes to the same operator range from 10 minutes to unlimited, maintaining a structure similar to that of 2023. As for minutes to all operators, the ranges vary between 8 and 100 minutes.

In the case of mobile data, download capacity in gigabytes (GB) ranges from 0.03 GB to unlimited, with offers reaching up to 600 GB, representing greater variety in terms of availability and accessibility for consumers. This increase in download capacity responds to the growing demand for connectivity and online content consumption.

In conclusion, the growth of the prepaid segment is also reflected in the incorporation of additional promotions and benefits, notably the offer of free data for the use of high-demand applications, which increases the perceived value of the plans without implying a direct increase in costs for the user. These types of strategies have allowed operators to differentiate their products in a highly competitive market with increasingly demanding consumers.

Postpaid plans

In postpaid commercial offers (see Annexes Tables No. 62 and No. 63), there was a significant reduction in the number of plans available. As of December 2023, there were 80 options on the market, while by December 2024, the offering had decreased by 25% to 60 plans. This behavior is a response to a process of market consolidation, with operators seeking to optimize their portfolios and improve profitability per user.

The operator Claro increased its offering by 24 %, from 25 to 31 plans. In contrast, Liberty Tel drastically reduced its availability from 34 to 10 plans (71 %), while Kölbi experienced a smaller drop of 10 % (from 21 to 19 plans).

In terms of market distribution, Claro leads with 52 % of available offers, followed by Kölbi with 32 % and Liberty Tel with 17 %. This reinforces Claro's strategy of expanding its presence in the postpaid segment, while Liberty Tel appears to be redesigning its commercial approach.

From the perspective of plan content, 63 % of offers are focused exclusively on the Internet, 25 % combine voice and data, and 12 % are voice-only plans. The trend of prioritizing data services continues, reflecting the growing demand for connectivity in the Costa Rican market.

As for the offer of additional services, most provide free data in its entirety or up to a certain level of consumption in popular applications such as WhatsApp, Facebook, Instagram, X, TikTok, LinkedIn, Waze, among others, so that data consumption is not reduced when using these types of applications. It is important to note that offers vary depending on the operator and the package offered.

In terms of plan structure, offers that include minutes to the same operator (*on-net*) are mostly unlimited, continuing the trend observed in 2023. For minutes

to other operators (*off-net*), there are options ranging from 8 minutes to unlimited plans, with some packages reaching 1,500 minutes. For calls to all networks, both mobile and landline, the alternatives range from 15 minutes to unlimited plans, with packages including up to 3,000 minutes.

With regard to mobile data, download capacity varies from 0.0035 GB to unlimited plans, with offers reaching 512 GB, maintaining the behavior of the previous year.

This overview shows that the evolution of the postpaid market continues to be marked by diversification of plans, a gradual reduction in prices, and constant improvements in service quality. The recurring presence of promotional campaigns and the expansion of upload and download capacities reinforce the competitiveness of the sector, providing more attractive options tailored to consumer needs.

Commercial offers in the fixed telecommunications market

With regard to fixed telecommunications commercial offers (fixed Internet, fixed telephony, and subscription television), there has been a continuing trend toward bundled services in recent years[32]. This trend can be attributed to the practicality of offering these services as a bundle package, whereby a single type of infrastructure can used to supply a household. In addition, the option to include a TV subscription bundled with other services has contributed to this trend. Operators have increased the number of options available, and improved price perception, in an effort to adapt to changing customer needs and preferences.

The packages include duo combinations (Internet + telephone, telephone + TV, Internet + TV) and triple combinations (Internet + TV + telephone)[33]. Within each package, there are various options with added value or combinations that promote competition, both in terms of price and consumer benefits.

To analyze the evolution of these offers, data provided by the main fixed telecommunications operators in the country has been considered, which are:

- Millicom Cable Costa Rica, S. A. (Millicom)
- Telecable S. A. (Telecable)
- Instituto Costarricense de Electricidad (Kölbi)
- Liberty Servicios Fijos LY SA (Liberty SF)
- Claro CR Telecomunicaciones SA (Claro)

These operators account for at least 90 % of total subscriptions in the market. Details of the offers can be found in Annexes Table No. 64 and No. 65, which present the packages available to consumers in December 2023 and December 2024.

During the period analyzed, there was an increase in the number of bundled offers among the five operators, from 117 plan options at the end of 2023 to 138 plans at the end of 2024, representing an 18 % increase.

Claro was the operator that offered the most packages at the end of 2024, with 54 options, compared to 26 options in 2023, representing an increase of 108 %. Telecable offered 24 packages in 2024, compared to 28 in 2023, reflecting a 14 % reduction. Liberty SF presented 8 packages in 2024, compared to 11 in 2023, implying a 27 % decrease. Kölbi and Millicom maintained their offerings constant with 46 and 6 packages respectively in both years.

In terms of market share of available offerings, Claro led with 39 %, followed by Kölbi with 31 %, Telecable with 17 %, Liberty SF with 6 %, and Millicom with the remaining 4 %.

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32 It should be noted that the bundling mentioned here differs from tied sales, which are contrary to the law. Bundled services allow customers to benefit from network economies of scale. Customers have the option to purchase a single service from one provider, to purchase a bundle package, or to purchase multiple single services from multiple providers. Given the growing uptrend in bundled services, a detailed analysis of these commercial offers will be carried out.

33 Mobile telephony is not yet offered as a bundled service on the market.

In 2024, there was a significant increase in Internet + Television duo offers, which grew by 66 %, from 44 offers in 2023 to 73 in 2024. On the other hand, fixed telephony + Internet duo offers decreased by 4 %, from 22 to 23 offers, while triple packages (telephony + Internet + television) decreased by 7 %, from 41 to 38 offers.

In terms of market composition, dual packages accounted for 72 % of the offers available in 2024, compared to 62 % in 2023, reflecting a consumer preference for purchasing packages that include more services. Triple packages accounted for 28 % in 2024.

In terms of available technologies, operators offer everything from hybrid options combining cable, copper, and fiber to exclusive fiber optic packages. By 2024, packages with hybrid options (copper + fiber) accounted for 16 % of total offers, hybrid options (cable + fiber) accounted for 9 %, and fiber-only offers accounted for 56 % of total offers, highlighting the growing dominance of fiber optics in the market. In addition, the speeds offered in Internet packages have increased, with the average rising from 170 Mbps in 2023 to 209 Mbps in 2024.

In conclusion, commercial fixed telecommunications offers continue to evolve, showing a dynamic transformation in the market. This process is marked by significant changes in the composition of services and the participation of the most relevant operators. As consumers seek more comprehensive options, duo and triple packages are gaining popularity, reflecting a preference for solutions that combine several services. The reduction in the number of bundled offers suggests market consolidation, with more simplified and focused options. Likewise, there is diversification in connection technologies, with a clear trend toward the adoption of fiber optics and an increase in Internet speeds, demonstrating a continued commitment to improving the consumer experience.

PRICE

Following the qualitative review of commercial offers, a quantitative study of current market prices for the 2023-2024 period will be conducted. A comparative analysis of average rates for different types of bundled services will be carried out, with the aim of identifying significant fluctuations and trends during the analysis period.

In addition, the results of specific price indexes for services associated with the retail market[34] will be shown, with the aim of monitoring trends in this market segment. This quantitative analysis will provide valuable insights, objective information, and hard data to better understand the prevailing competitive dynamics of the market. In this context, the Mobile Telecommunications Price Index (IPTM), the Fixed Internet Price Index (IPIF), and the International Call Price Index will be analyzed. The entire process will be carried out following the methodological guidelines established and approved by the SUTEL Council.

Average prices of commercial offers for bundled services (2023-2024)

In relation to the evolution of prices for bundled services, the year-on-year comparison from 2023 to 2024 shows a downward trend in most of the modalities analyzed. According to the data shown in , the average price of bundled services decreased by 13 % overall.

Analysis by Package Type:

The analysis of the evolution of average prices is broken down by the type of package contracted, which allows specific trends to be identified in each type of bundled service. The main findings in each packaging category are presented below.

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34 A retail price index measures the evolution (trend) of consumer prices in a specific market from a base month, based on a given configuration of product, user, and consumption levels. For this reason, SUTEL has developed three different methodologies to monitor this behavior, so as to determine the evolution of the mobile telecommunications market, the fixed Internet market, and the international call service market.

Fixed Internet + Fixed Telephony: Duo plans that include fixed Internet and fixed telephony showed an average reduction of 14 %, suggesting a rate adjustment strategy on the part of operators. In particular, while prices for speeds up to 30 Mbps remained stable, the most significant reductions were observed at higher speeds, with a notable 32 % drop in plans for 100, 200, 300, and 500 Mbps.

The minimum price recorded for this type of plan in 2024 was 12,084 colones for speeds of 1 Mbps, while the maximum was 53,500 colones for 1000 Mbps plans.

Fixed Internet + Subscription Television: In this category, there was an overall decrease of 8 %, with the largest drop recorded in 500 Mbps plans, which saw a 48 % reduction in price. While prices for speeds below 30 Mbps remained unchanged or with minimal variations, the largest reductions were concentrated in higher speeds.

The minimum price recorded in this segment was 26,022 colones for speeds of 1 Mbps, while the maximum reached 60,567 colones for 1000 Mbps packages.

Fixed Telephony + Subscription Television: Unlike the other categories, packages that include fixed telephony and television saw a 31 % increase in prices. This is mainly due to the adjustment in the rates for 600 Mbps plans, which increased from 26,304 colones in 2023 to 42,500 colones in 2024, noting that only two packages were available in this category, offered by Telecable and Kölbi.

Fixed Internet + Television + Fixed Telephony: Packages that include all three services recorded the largest drop, with an average reduction of 39 %. The largest decrease was observed in 120 Mbps plans, which went from 109,225 colones in 2023 to 36,960 colones in 2024, representing a 66% drop. Also noteworthy is the 30 % reduction in 300 Mbps plans.

In this segment, the minimum price recorded in 2024 was 29,069 colones for speeds of 1 Mbps, while the maximum price reached 60,400 colones for 1000 Mbps plans.

In conclusion, the data analyzed reflects a price adjustment strategy in the bundled services market, with a general downward trend in packages that include Internet, encouraging users to sign up for higher speed plans. It can be seen that the price reduction is more noticeable as the connection speed increases, which could be aimed at encouraging a migration to packages with higher speeds.

Finally, in the price comparison between Internet + television duo packages and triple packages, there is an average difference of 3,296 colones in the 1 to 10 Mbps speed ranges, suggesting that the market continues to offer incentives for contracting more comprehensive packages at competitive prices.

Mobile Telecommunications Price Index (IPTM)

SUTEL developed a price index for mobile telecommunications (which include voice, SMS and mobile data services) that monitors prices as of July 2017, the reference month, which took place before the market was declared to be under fair competitive conditions.

In accordance with the results of this index, prices have maintained a downward trend since July 2017, reaching 65.6 % at the end of 2024, which is 34.4 pp less than the prices in the reference month (see Graph No. 208).

When analyzing the above by payment method, in 2024 postpaid closed at 63.7 % at the end of 2024, i.e., 36.3 pp less than the prices in the reference month, mainly due to plans that, because of their number of subscribers, are included in the index calculations and offer, in particular, more data capacity and on-net and off-net minutes than those they replaced, while prepaid closed with a downward difference of 17.4 pp (see Graphs No. 209 and No. 210).

Fixed Internet Price Index [IPIF]

This price index monitors the price per Mbps provided by operators in their commercial offers. Graph 211 shows that prices have decreased overall by 71.60 % in relation to the reference month (July 2018). If the average monthly behavior of this indicator is annualized for the calculation period from July 2021 to December 2024, there is a decrease of 47.77 % per year.

In 2024, fixed Internet prices fell by 71.60 % compared to July 2018

International Call Price Index

The International Call Price Index (ICPI) measures the behavior of per-minute prices offered by operators in their commercial offerings with international termination compared to July 2021 (base month). The results of the measurement for 2024 are as follows: during the second half of 2024, there is a downward trend in international per-minute rates, with a 69.10 % decrease recorded at the end of 2024, which is the trend during this period (see Graph No. 212).

GRAPH 208. COSTA RICA: Half-yearly evolution of the national mobile telecommunications price index, July 2017 (base), 2017-2024
(quarterly figures in percentage terms)

July 2017 (Reference Month)	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023	Q4 2024
100.0 %	95.2 %	97.3 %	88.0 %	87.4 %	86.3 %	74.4 %	68.1 %	65.6 %
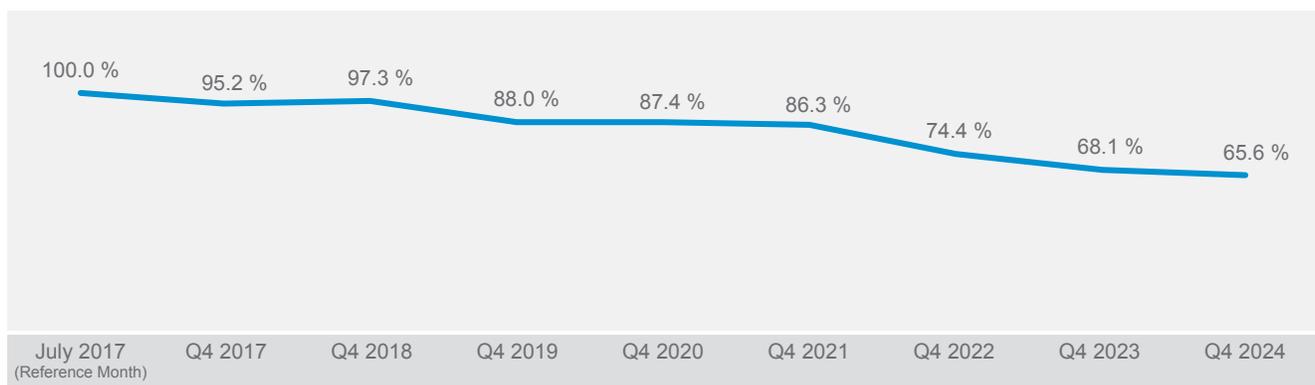
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 209. COSTA RICA: Half-yearly evolution of the national postpaid mobile telecommunications price index, July 2017 (base), 2017-2024

(quarterly figures in percentage terms)

| July 2017 (Reference Month) | Q4 2017 | Q4 2018 | Q4 2019 | Q4 2020 | Q4 2021 | Q4 2022 | Q4 2023 | Q4 2024 |

100.0 % · 94.2 % · 97.3 % · 86.7 % · 86.1 % · 84.8 % · 72.0 % · 65.8 % · 63.7 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 210. COSTA RICA: Half-yearly evolution of the national prepaid mobile telecommunications price index, July 2017 (base), 2017-2024

(quarterly figures in percentage terms)

| July 2017 (Reference Month) | Q4 2017 | Q4 2018 | Q4 2019 | Q4 2020 | Q4 2021 | Q4 2022 | Q4 2023 | Q4 2024 |

100.0 % · 96.4 % · 97.3 % · 92.0 % · 92.5 % · 92.3 % · 88.9 % · 85.0 % · 82.6 %
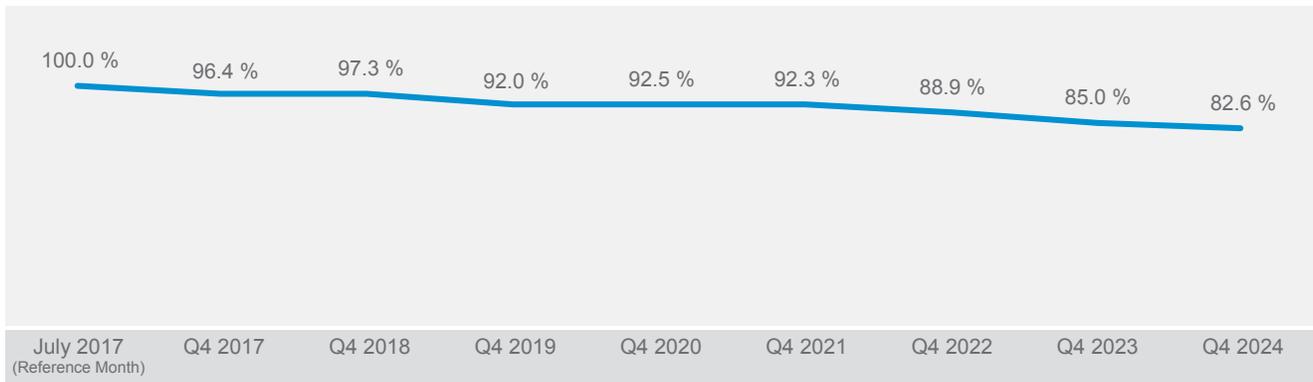
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 211. COSTA RICA: Evolution of the fixed Internet price index, July 2018 (base), 2018-2024

(half-yearly figures in percentages)

| July 2018 (Reference Month) | Q4 2018 | Q4 2019 | Q4 2020 | Q4 2021 | Q4 2022 | Q4 2023 | Q4 2024 |

100.0 % · 88.8 % · 64.6 % · 58.0 % · 50.6 % · 38.9 % · 35.4 % · 28.4 %
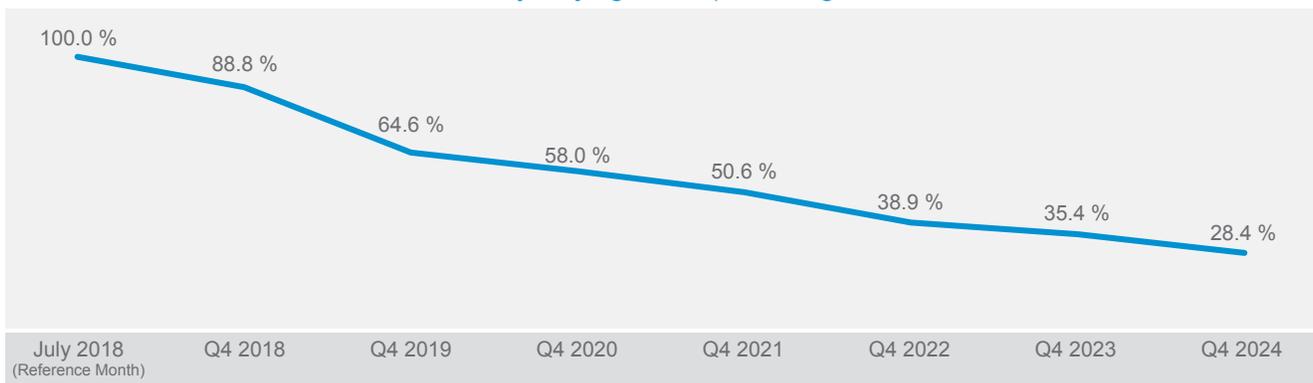
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

GRAPH 212. COSTA RICA: Evolution of the international calls price index, July 2021 (base), 2024

(half-yearly figures in percentages)

July 2021 (Reference Month)	Q2 2021	Q4 2021	Q2 2022	Q4 2022	Q2 2023	Q4 2023	Q2 2024	Q4 2024
100.00 %	99.11 %	99.32 %	88.83 %	84.53 %	79.29 %	79.06 %	73.71 %	69.10 %
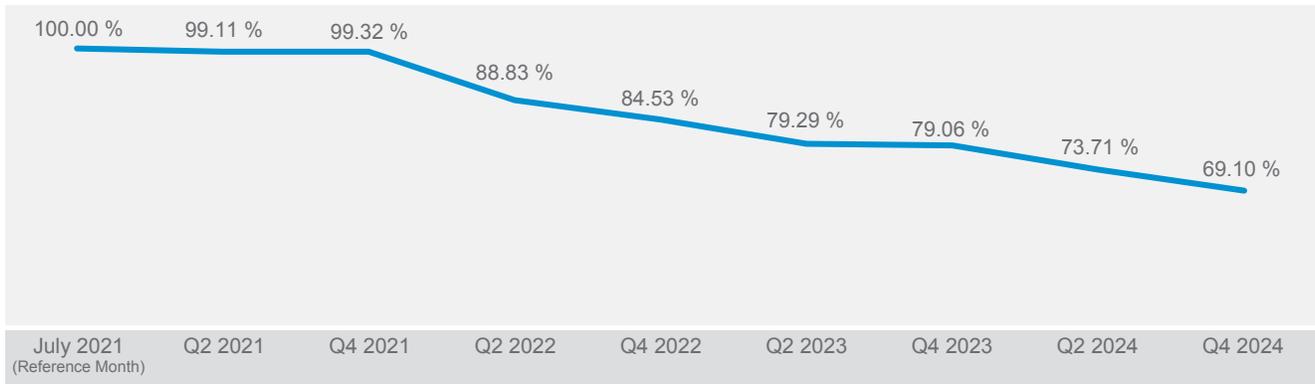
Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

NETWORK QUALITY
and performance

QUALITY OF FIXED INTERNET SERVICES

This section outlines the results of the assessments of the quality of fixed Internet access service carried out between 2021 and 2024. The results of field measurements taken using specialized measuring equipment (probes) connected to a total of 416 Internet access services throughout the country are shown. These are compared against the threshold (target value to be achieved) established by SUTEL in the Service Provision and Quality Regulations[35] and its associated resolutions.

Measurements are taken in accordance with the methodology described in this report, and in compliance with the stipulations set forth by the Board of Directors of SUTEL in Resolution No. RCS-019-2018, titled: "*Resolution on measurement methodologies applicable to the service provision and quality regulations.*"

The following sections present the results for each of the quality indicators that were calculated in order to assess the quality of the fixed Internet service provided.

Local latency results

Graph No. 213 shows the results of the local latency assessments conducted from 2021 to 2024. The local latency indicator measures the response time of an operator's network. In other words, it measures how fast a data packet travels through an operator's network, where the lower the value, the better the latency.

The regulatory threshold determined by SUTEL for this indicator is 50 ms (milliseconds). None of the operators have exceeded this threshold, according to their national average results, in any of the years under evaluation. In this indicator, three of the four operators showed a slight deterioration compared to the previous year, i.e., an increase in latency values: **Kölbi** went from 14.6 ms to 18.4 ms, **Liberty** from 16.6 ms to 32.2 ms, and **Telecable** from 6.3 ms to 6.6 ms. Tigo, on the other hand, showed an improvement, going from 22.4 ms to 15.3 ms. For the 2024 period, the average results of the four operators evaluated remain below the regulatory threshold of 50 ms, thus, as they do not exceed the established threshold, they comply with current regulations.

> **"**
> Overall, there is a slight increase in average local latency values, from 15 ms in 2023 to 18 ms in 2024
> **"**

The results shown in Graph No. 213 reflect that, despite the slight increase in local latency values, Telecable continues to achieve average durations in the single digits, with an average value of 6.6 ms. On the other hand, Tigo stands out with a decrease in local latency values, averaging 15.3 ms, which is the best result for this operator in the last four years, from 2021 to 2024.

Overall, there is a slight increase in average local latency values, from 15 ms in 2023 to 18 ms in 2024, while the average result for the last four years is also 18 ms.

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35   The Service Provision and Quality Regulations (RPCS) was published on February 17th, 2017, in the Official Gazette "La Gaceta" No. 36, and became effective as of February 17th, 2018.

Graph No. 214 shows the local latency results for all operators broken down by province for 2024. It should be noted that Telecable is the operator with the best average results in all provinces.

At the province level, the best results are obtained in Heredia with an average value of 13.4 ms for the entire province, followed by Cartago with 17.7 ms, San José and Limón with 18.1 ms, Alajuela with 18.9 ms, Guanacaste with an average of 19.7 ms, and finally Puntarenas with an average province value of 23.8 ms.

Table No. 18 shows the local latency values per province from 2021 to 2024, and highlights the local latency results per province that are lower than the 2024 nationwide median value of 18 ms. This table shows that in each province at least one operator has an outstanding annual result below 18 ms.

International latency results

Graph No. 215 shows the international latency results from 2021 to 2024. The key performance indicator for international latency is a purely informative parameter that measures the response time of an operator's network. In other words, it measures how fast a data packet travels between an operator's network and an international network, where the lower the value, the better the latency.

The reference value established by SUTEL regulations is a maximum of 150 ms (milliseconds), which was not exceeded by any of the operators in their average results at the national level during any of the years assessed. In this indicator, three of the four operators showed an improvement over the previous year, i.e., a reduction in international delay values: **Liberty** went from 58.5 ms to 58.0 ms, **Telecable** from 60.3 ms to 48.7 ms, and **Tigo** from 64.7 ms to 64.6 ms. Meanwhile, the operator **Kölbi** increased its value by 23.0 ms, from 63.3 ms to 86.3 ms, which is

a considerable increase compared to the country's international latency of 64 ms in 2024.

Overall, there was an improvement in the average international latency results for 2024 compared to the previous year for three of the four operators assessed. However, when considering the combined average of the four operators, the average value recorded in 2024 was 64 ms, very similar to that obtained in 2023, which was 62 ms.

"There is an improvement in the average international latency results for 2024 compared to the previous year for three of the four operators evaluated. However, when considering the combined average of the four operators, the average value recorded in 2024 was 64 ms"

Graph No. 216 shows the international latency results by province for 2024. When disaggregating the results, Telecable is the operator with the best results in all the provinces assessed. On the other hand, it is noteworthy that in the province of Limón, the operator **Kölbi** obtained an average result of 229.5 ms, which is above the recommended threshold of 150 ms.

At the province level, the best results are obtained in Heredia with an average value of 57.8 ms for the

entire province, followed by Cartago with 58.2 ms, San José with 61.7 ms, Alajuela with an average of 62.1 ms, Guanacaste with 63.0 ms, Puntarenas with 67.5 ms and, finally, Limón with a province average of 100.3 ms.

Table No. 19 also shows the province results, but with a history covering 2021 to 2024, highlighting values that are better than the national average of 64 ms obtained during 2024. This table shows the best results in the last four years (2021 to 2024), with the provinces of San José, Cartago, and Heredia standing out with the highest number of annual results below the national average of 64 ms.

Table No. 19 also shows that in the 2024 average results for the province of Heredia, the four operators assessed obtained results below the national average of 64 ms of international latency.

Result of download speed compared to the contracted speed

The quality assessments conducted by the SUTEL make it possible to compare the measured download speed and contracted speed for every service under analysis. The ratio of measured download speed to contracted speed is shown in percentage terms and represents how much of the advertised bandwidth a given operator actually provides per customer. In regard to download speed, the resulting ratio expresses the relation between the measured download speed and the download speed contracted from the operator for each service under analysis.

Graph No. 217 shows the results of the measurements recorded from 2021 to 2024; it includes all the services under evaluation in the country. This indicator

measures how much is obtained compared to what was advertised, which means that the higher the value, the better the result. It should be noted that the threshold established by SUTEL regulations is 80 %, which will be exceeded in 2024 by the four operators included in the study, as the country averages for the four operators were above that percentage, as shown in Graph No. 217.

Graph No. 217 highlights the operator **Telecable** with a result of 100 % in the 2024 period, maintaining a stable trend at the top of the average performance since 2023. For its part, the operator **Liberty** shows an improvement in 2024 compared to the previous period, with an increase of 4 percentage points in its result, reaching 97 %.

In the same Graph No. 217, operators Kölbi and Tigo show a decrease in their 2024 results compared to the previous period; however, they remain above the 80 % threshold, as in 2021, 2022, and 2023.

Graph No. 218 shows the same indicator of download speed performance, but broken down by province for the 2024 period. The data show that the best average results were obtained in the provinces of Heredia and San José, with average values of 98 % and 97 %, respectively, followed by Puntarenas with 96 %, Alajuela and Guanacaste with 94 %, Cartago with 93% and Limón with 91 %.

Table No. 20 shows the results by province, but with a history covering 2021 to 2024, highlighting values equal to 100 %, as these are cases in which better service performance is achieved as a result of optimal provisioning by operators, enabling them to ensure the services contractually agreed with their users. This table shows that in all provinces at least one operator achieved results equal to 100 %, with San José and Heredia being the provinces with the best results in 2024.

Measured upload speed vs provisioned upload speed

As with download speed, upload speed results are also shown as a percentage of the contracted speed and reflect the extent to which operators comply with the conditions agreed with their customers for Internet access services. This indicator therefore shows the percentage relationship between the upload speed obtained from the measurements and the provisioned upload speed with the operator for each service evaluated.

Graph No. 219 shows the results of the measurements recorded from 2021 to 2024; it includes all the services under evaluation in the country. This indicator measures how much is obtained compared to what was advertised, which means that the higher the value, the better the result. For transmission speeds, the threshold established by SUTEL is also 80 %, which will be exceeded in 2024 by operators **Kölbi**, **Liberty**, and **Telecable**, with average results at the national level above that percentage, as shown in Graph No. 219.

In Graph No. 219, operators **Kölbi** and **Liberty** stand out with a result for the 2024 period of 100 %, both maintaining a stable trend at the top of the average performance since 2023. For its part, the operator **Telecable** shows a decrease in its 2024 result compared to the previous period; however, it remains above the 80 % threshold, as in 2021, 2022, and 2023.

In the same Graph No. 219, the operator Tigo had a 2024 result of 62 %, which represents a decrease compared to previous periods and is below the regulatory threshold.

Graph No. 220 shows this same indicator of upload speed performance, but broken down by province for the period 2024, and whose data show that the best average results were obtained in the province of Limón with 93 %, followed by Puntarenas and Cartago with 90 %, San José and Heredia with 89 % and, finally, Alajuela and Guanacaste, which recorded 87 %.

Table No. 21 also shows the province results with a history covering 2021 to 2024, highlighting values equal to 100 %, as these are cases in which better service performance is achieved as a result of optimal provisioning by operators, enabling them to ensure the services contractually agreed with their users. The table shows that the operators **Kölbi** and **Liberty** achieved outstanding results in all provinces of the country.

QUALITY OF MOBILE SERVICES

This section describes the results of assessments of the quality of users' mobile connections, both for voice services and Internet access, carried out in the period 2023. The results of field measurements taken using a specialized measurement system consisting of a total of 72 mobile probes installed in vehicles traveling throughout the country and conducting tests to determine the quality of service under mobile conditions are shown. The results obtained are compared against the threshold (target value to be achieved) established by SUTEL in the Service Provision and Quality Regulations and its associated resolutions.

Measurements are taken in accordance with the methodology described in this report, and in compliance with the stipulations set forth by the Board of Directors of SUTEL in Resolution No. RCS-019-2018, titled: *"Resolution on measurement methodologies applicable to the service provision and quality regulations."*

The following sections describe the results obtained for each of the quality indicators applicable to mobile voice and data services.

Coverage results (percent coverage)

The coverage assessment included an analysis of the different types of coverage, in accordance with the respective areas covered by operators and reported to SUTEL. The three types of coverage are: inside buildings, inside motor vehicles, and outside only. Compliance by type of coverage required the coverage layers for 2023 provided by the operators **Claro**, **Kölbi**, and **Liberty**.

For the purposes of this analysis, data was filtered via SUTEL's Geographic Information System (GIS) to verify that the intensity of the signal strength recorded in the field is consistent with the information reported by the operators, in terms of the different types of coverage, who make this information public on their respective websites.

It should be noted that the regulatory threshold for the "Mobile service coverage area" indicator is 90 % for 2G, 3G, and 4G technologies. The higher the percentage value, the better the results.

In 2023, for the 2G network, the operator **Claro** obtained coverage accuracy results of 82.5 %, **Kölbi** 89.9 %, and **Liberty** 81.4 %, as shown in Graph No. 221. These results show the percentage of measurements whose results were equal to or greater than the coverage offered by the operator.

In the case of the 3G network for 2023, as shown in Graph No. 222, **Claro** obtained a coverage accuracy of 90.6 %, while operators **Kölbi** and **Liberty** recorded results of 91.6 % and 91.8 %, respectively, for the same indicator. In the specific case of 3G networks, the three mobile operators obtained average results in 2023 above the regulatory threshold of 90 %.

As for the 4G network, Graph No. 223 shows that in 2023, the number of measurements taken by **Claro** that matched the coverage recorded by this operator was 81.8 %, while for **Kölbi** it was 81.9 % and for **Liberty** 92.5 %, the latter being the operator that exceeded the regulatory threshold of 90 % for 4G networks.

This indicator measures the degree of coverage that a given operator fulfills in terms of what was advertised to customers. In Graph No. 223, for example, results show that, with respect to 4G technology, 81.8 % of the measurements taken by the SUTEL with regard to **Claro** were found to be in compliance. In other words, 18.2 % of Claro's measurements did not meet the minimum coverage threshold promised by said operator. Similarly, with regard to **Kölbi**, 81.9 % of measurements exceeded the coverage advertised by the operator, while 18.1 % of the measurements did not meet the minimum coverage threshold reported by the state-owned operator in 2023. Meanwhile, **Liberty** was found to be the operator that best complies with the published coverage layers, achieving 92.5 % compliance, with only 7.5 % of measurements below the coverage levels promised for 2023.

Voice service results

The call-failed indicator measures the percentage of failed call attempts that were unsuccessful due to technical difficulties with the operator's network. As such, the lower the number, the better the quality of the service.

According to the national average, in 2023, only two of the three operators complied with the call-failed percentage below the regulatory threshold of 3 % for 2G technology. These are **Claro**, with 2.5 %, and **Liberty**, with 2.6 %, while **Kölbi** obtained an average result of 3.5 %. In the case of the 3G network, all three operators comply with the threshold, with average results below 3 %, with results of 1.3 % for **Claro**, 2.8 % for **Kölbi**, and 1.8 % for **Liberty**. This is shown in Graph No. 224.

The dropped-call indicator measures the percentage of calls that, after a successful connection, are unexpectedly dropped before normal termination due to technical difficulties with the operator's network. As with the previous indicator, the lower the number, the better the quality of the service. In the case of 2G technology, none of the three operators achieved a result below the regulatory threshold of 2 %; the results are 6.1 % for **Claro**, 2.4 % for **Kölbi**, and 3.6 % for **Liberty**. In the case of the 3G network, only two of the three operators managed to fall below the regulatory threshold of 2 %, namely **Claro** with 1.3 % and **Liberty** with 1.8 %, while the operator **Kölbi** obtained an average result of 3.2 % for this technology. These 2023 results for this indicator are shown in Graph No. 225.

The call set-up time indicator measures the duration of time needed in seconds from the moment a user initiates a call to the moment a dial tone is heard. The regulatory threshold for this indicator states that call set-up time should not exceed 8 seconds. Consequently, the lower the number of seconds, the better the quality of the service. The results obtained for 2G technology are: 4.6 seconds for Claro, 3.3 seconds for Kölbi, and 4.7 seconds for Liberty. In the case of 3G technology, the results were: 4.9 seconds for Claro, 3.4 seconds for Kölbi, and 3.3 seconds for Liberty. For this indicator, all operators met the threshold established for communications on 2G and 3G networks. The 2023 results are shown in Graph No. 226.

The voice quality indicator quantifies the audio quality during phone calls on a scale of 1 to 5, where results above 3 reflect good quality, those above 3.5 exceed the threshold established in current regulations, and the closer the result is to 5, the better the call quality. The results for 2023 for 2G network technology were 3.4 for Claro, 3.2 for Kölbi, and 3.6 for Liberty. For 3G technology, the results were 3.2 for Claro, 3.3 for Kölbi, and 3.6 for Liberty. Note that in both cases, Liberty is the only operator to exceed the 3.5 threshold, with a score of 3.6. The results for both technologies are shown in Graph No. 227.

Data service results

To record mobile service connection results, measurements were taken while traveling along the country's roads and compiling the results for each operator.

In the specific case of data services, the results of measurements collected within each operator's coverage layers were used, corresponding to two specific types of coverage: indoor coverage and coverage inside vehicles, which correspond to the best signal strength levels.

The local latency indicator is determined by conducting ping tests against a dedicated server in Costa Rica, located in the Internet Exchange Point (IXP) operated by "NIC Costa Rica," commonly referred to as CRIX, in accordance with the provisions established in article 44 of the Service Provision and Quality Regulations. For the purposes of this indicator, the lower the number of milliseconds, the better the quality of the service. The 2023 results for the 3G network were 95.2 milliseconds for Claro, 50.0 milliseconds for Kölbi, and 58.0 milliseconds for Liberty. In the case of the 4G network, the results were 35.5 milliseconds for Claro, 35.9 milliseconds for Kölbi, and 32.4 milliseconds for Liberty. These 2023 results are shown in Graph No. 228.

The results for download speed for 3G and 4G networks are shown in Graph No. 229. The results for the operator Claro were 3.6 Mbps on 3G and 19.8 Mbps on 4G; on Kölbi networks, average download speeds were 4.1 Mbps on 3G and 21.8 Mbps on 4G; while for Liberty, these results were 4.6 Mbps on 3G and 23.6 Mbps on 4G. It is important to note that the speeds shown in Graph No. 229 depend largely on the characteristics of the data plans configured on the devices used to perform the measurements and may therefore differ from the speeds experienced by some users. Nevertheless, the results show a marked difference in performance achieved through 4G connections compared to the previous 3G technology.

The results for upload speeds for 3G and 4G networks are shown in Graph No. 230. The results for the operator Claro were 1.6 Mbps on 3G and 15.2 Mbps on 4G; on Kölbi networks, average download speeds were 1.5 Mbps on 3G and 15.5 Mbps on 4G, while for Liberty these results were 0.5 Mbps on 3G and 20.4 Mbps on 4G. As in the previous case, the speeds shown in Graph No. 230 depend largely on the characteristics of the data plans configured on the devices used to perform the measurements and may therefore differ from the speeds experienced by some users.

QUALITY OF THE INTERNET SERVICE USER EXPERIENCE

This section of the report outlines the results of the quality of the user experience, which was determined through the use of the Opensignal speed test application. The app is free of charge and collects data from users who voluntarily install the application to their mobile device. This data is, therefore, sourced from a variety of terminal devices with different data plans, and is applicable to the various services provided to users based on their respective data plan.

Starting in 2016, Opensignal has allowed SUTEL to generate reports on the quality of service experienced by the user (QoE) from the data collected via this tool. This collaborative tool was designed to collect data directly from the user's terminal device (mobile phone).

The data used to generate these reports is collected irrespective of the user's location or, in other words, with no regard to whether the user is indoors or outdoors, in a rural or urban area, stationary or in motion, or in a city or traveling the country's highways and roads. The performance of the networks is measured under different scenarios comparable to the experience a user would have when utilizing mobile services.

Graph No. 231 shows how the 3G speeds of each operator have changed in Costa Rica from 2019 to 2024. Until the first half of 2021, the three operators maintained a similar growth rate; however, from the second half of 2021 until 2023, there is evidence of a more abrupt change in speed growth. From 2023 onwards, growth is linear, as in the period prior to 2021; but with a marked increase in speed by Liberty, whose users were able to enjoy connections close to 10 Mbps with 3G technology according to the results for the second half of 2024, while Kölbi and Claro users remained in the same semester with connections of 4.3 Mbps and 5.0 Mbps, respectively.

Graph No. 232 shows the evolution of download speeds for 4G technology, highlighting a marked difference when compared to its 3G equivalent. Kölbi has reported stable Internet speeds from 2019 to 2024 in a range of 10 Mbps, between 23 Mbps and 33 Mbps, reaching approximately 31 Mbps in 2024. The Internet speeds of Liberty have been steadily increasing over the last 6 years, with 2024 reporting

the most notable increase, when it rose from 10 Mbps to 23 Mbps by year-end 2024. Claro ranked first in 2024 in terms of highest Internet browsing speed in 4G networks, reaching an average speed of 37 Mbps by year's end.

Graph No. 233 shows the percentage of time that a user of a specific operator is connected to a 4G network, and is representative of the quality of service experienced by users, as it reflects the ease with which users can enjoy high Internet speeds in a 4G network. For this indicator, the latest results in 2024 reveal that Claro and Liberty show an upward trend in terms of 4G coverage, reaching a value of 90 % and 87 %, respectively, whereas Kölbi's (state operator) coverage remained largely unchanged since 2020, reaching a 4G coverage of 70 % by year-end 2024.

"

the latest results in 2024 reveal that Claro and Liberty show an upward trend in terms of 4G coverage, reaching a value of 90 % and 87 %, respectively, whereas Kölbi's (state operator) coverage remained largely unchanged since 2020, reaching a 4G coverage of 70 % by year-end 2024

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GRAPH 213. COSTA RICA: Local latency from 2021 to 2024
(figures in milliseconds)

	Kölbi	Liberty	Telecable	Tigo
2021	14.6	22.0	27.5	17.5
2022	15.7	13.9	22.4	17.0
2023	14.6	16.6	6.3	22.4
2024	18.4	32.2	6.6	15.3

2021 2022 2023 2024 — — — Umbral
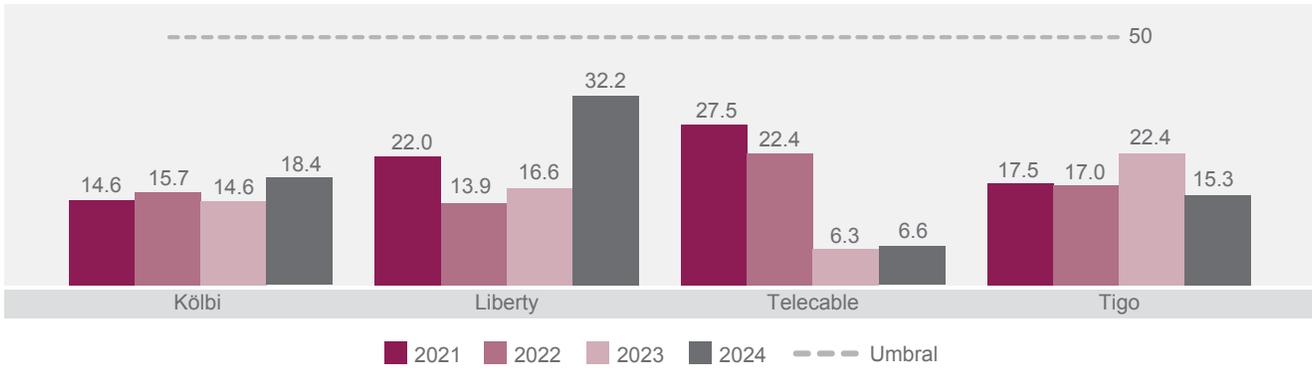
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 214. COSTA RICA: Local latency per province in 2024
(figures in milliseconds)

Province	Kölbi	Liberty	Telecable	Tigo
San Jose	22.2	32.4	4.6	13.3
Alajuela	13.8	33.8	10.4	17.7
Cartago	15.2	34.1	7.5	14.0
Heredia	5.5	32.3	4.0	12.0
Guanacaste	15.7	30.5	11.4	21.1
Puntarenas	36.3	28.6	10.5	19.8
Limon	12.4	35.9	7.1	17.0
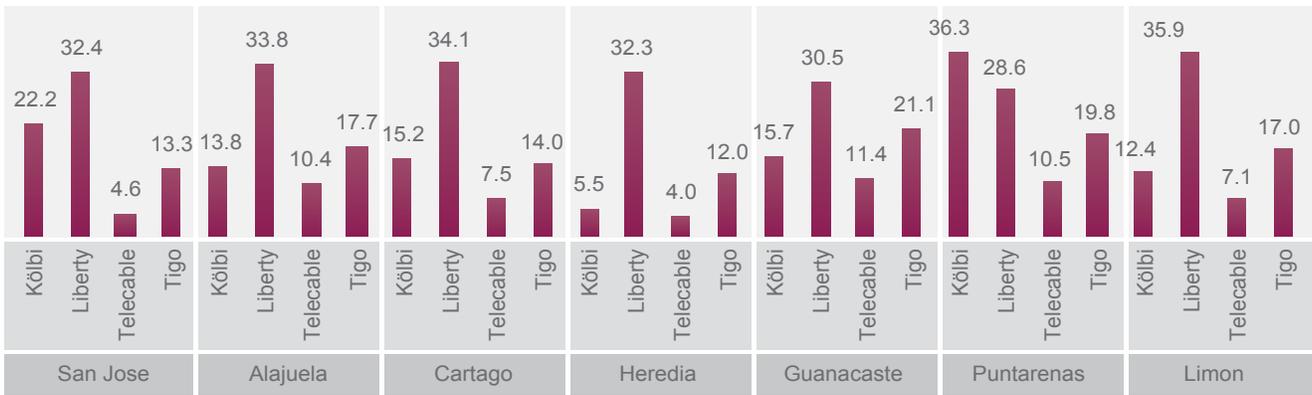
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

TABLE 18. COSTA RICA: Local latency per province from 2021 to 2024
(figures in milliseconds)

Province	Operator	2021	2022	2023	2024
San Jose	Kölbi	11.2	12.1	10.3	22.2
	Liberty	17.9	12.4	15.8	32.4
	Telecable	26.9	10.6	5.0	4.6
	Tigo	13.3	13.2	19.9	13.3
Alajuela	Kölbi	16.9	18.5	16.6	13.8
	Liberty	15.1	14.3	15.5	33.8
	Telecable	32.9	55.2	9.2	10.4
	Tigo	23.7	18.3	22.1	17.7

Province	Operator	2021	2022	2023	2024
Cartago	Kölbi	13.8	17.4	25.5	15.2
	Liberty	33.6	12.7	16.4	34.1
	Telecable	15.0	32.1	4.2	7.5
	Tigo	16.4	16.8	26.3	14.0
Heredia	Kölbi	9.7	14.6	10.6	5.5
	Liberty	40.3	12.8	16.7	32.3
	Telecable	34.5	29.4	7.4	4.0
	Tigo	13.6	17.6	21.5	12.0
Guanacaste	Kölbi	24.7	18.7	13.5	15.7
	Liberty	16.7	17.4	20.6	30.5
	Telecable	18.8	8.8	7.7	11.4
	Tigo	19.3	19.4	23.9	21.1
Puntarenas	Kölbi	17.2	19.0	15.1	36.3
	Liberty	21.1	16.6	16.6	28.6
	Telecable	20.7	18.4	38.0	10.5
	Tigo	20.2	19.5	24.3	19.8
Limon	Kölbi	15.5	16.1	15.6	12.4
	Liberty	18.7	20.4	22.8	35.9
	Telecable				7.1
	Tigo	18.9	19.4	16.6	17.0

Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 215. COSTA RICA: International latency from 2021 to 2024
(figures in milliseconds)
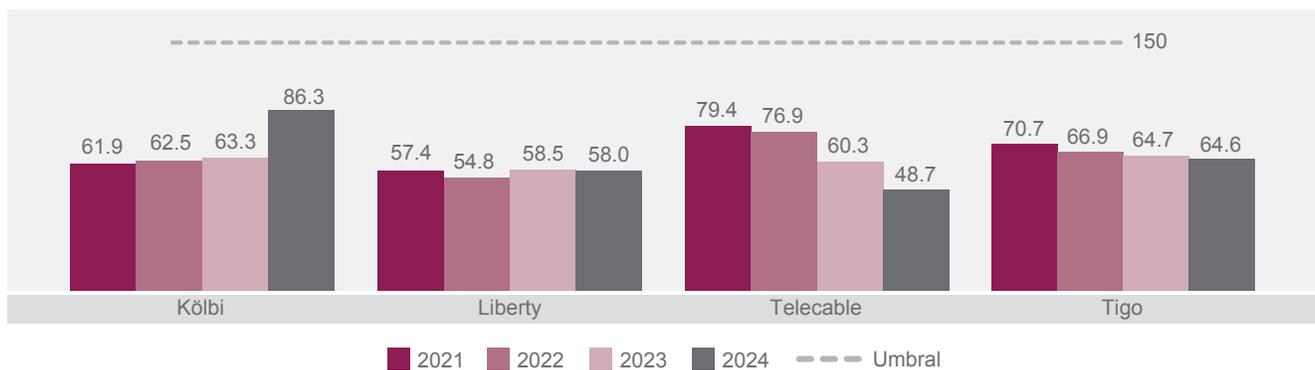
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 216. COSTA RICA: International latency per province in 2024
(figures in milliseconds)

	Kölbi	Liberty	Telecable	Tigo
San Jose	82.1	56.7	47.6	60.5
Alajuela	71.9	58.0	48.6	69.8
Cartago	65.5	56.3	49.6	61.6
Heredia	62.6	58.7	48.7	61.1
Guanacaste	69.4	60.0	51.8	70.9
Puntarenas	90.5	60.1	51.0	68.4
Limon	229.5	56.7	43.9	70.9
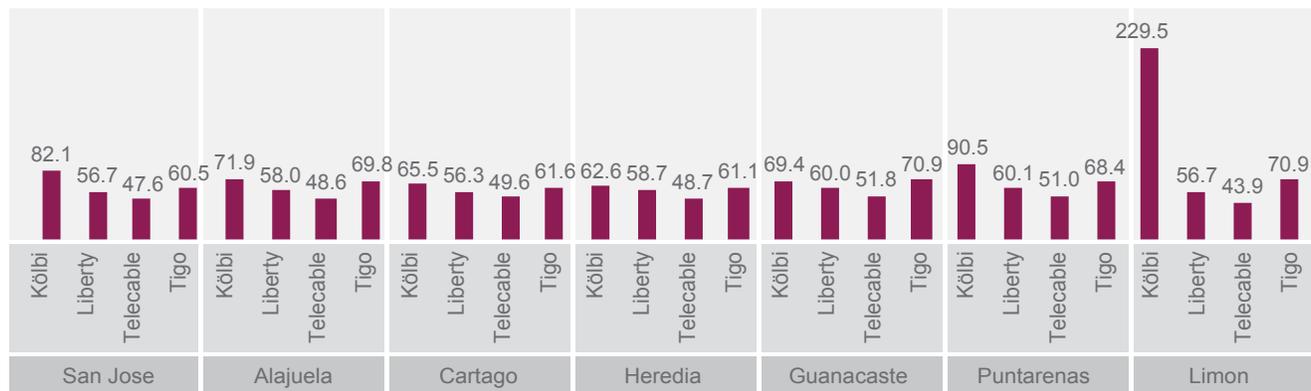
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

TABLE 19. COSTA RICA: International latency per province from 2021 - 2024
(figures in milliseconds)

Province	Operator	2021	2022	2023	2024
San Jose	Kölbi	60.9	62.4	63.8	82.1
	Liberty	55.6	53.9	57.4	56.7
	Telecable	79.3	65.0	59.4	47.6
	Tigo	61.7	61.6	63.3	60.5
Alajuela	Kölbi	62.8	63.0	60.2	71.9
	Liberty	56.9	54.8	58.4	58.0
	Telecable	84.3	113.1	64.1	48.6
	Tigo	81.9	66.9	66.9	69.8
Cartago	Kölbi	62.2	62.1	69.7	65.5
	Liberty	55.4	54.0	56.9	56.3
	Telecable	67.2	85.7	60.9	49.6
	Tigo	61.9	68.4	62.4	61.6
Heredia	Kölbi	57.2	57.6	58.3	62.6
	Liberty	59.9	53.7	56.5	58.7
	Telecable	85.0	82.7	57.8	48.7
	Tigo	70.3	65.2	60.9	61.1
Guanacaste	Kölbi	67.1	66.5	62.8	69.4
	Liberty	59.0	58.4	63.3	60.0
	Telecable	71.5	67.7	62.7	51.8
	Tigo	74.3	75.9	73.0	70.9

Province	Operator	2021	2022	2023	2024
Puntarenas	Kölbi	64.2	67.9	65.3	90.5
	Liberty	59.9	55.4	62.0	60.1
	Telecable	73.0	73.5	95.0	51.0
	Tigo	72.4	68.5	65.7	68.4
Limon	Kölbi	60.2	64.0	67.4	229.5
	Liberty	61.6	61.2	62.6	56.7
	Telecable				43.9
	Tigo	70.4	75.9	67.3	70.9

Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 217. COSTA RICA: Result of download speed compared to contracted speed, 2021–2024
(figures in percentage terms)
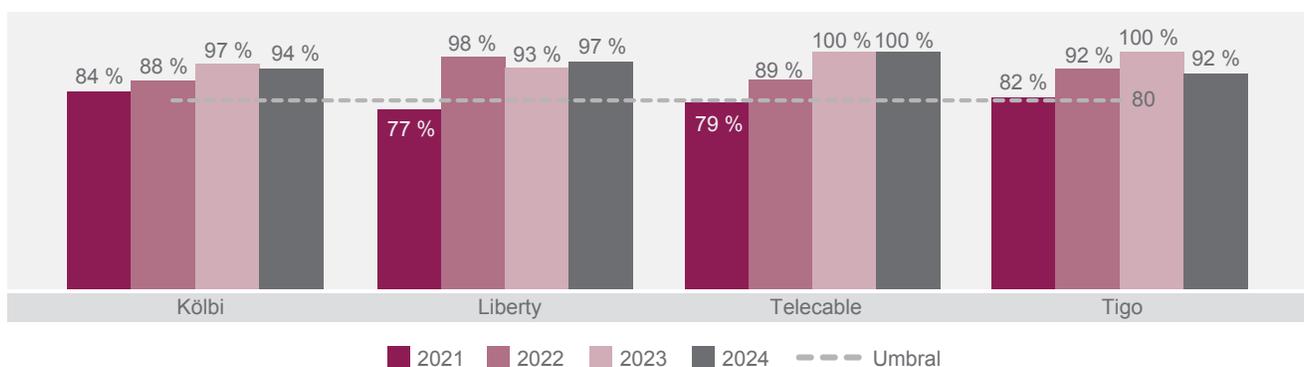
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 218. COSTA RICA: Results by province for download speed compared to contracted speed, 2024
(figures in percentage terms)
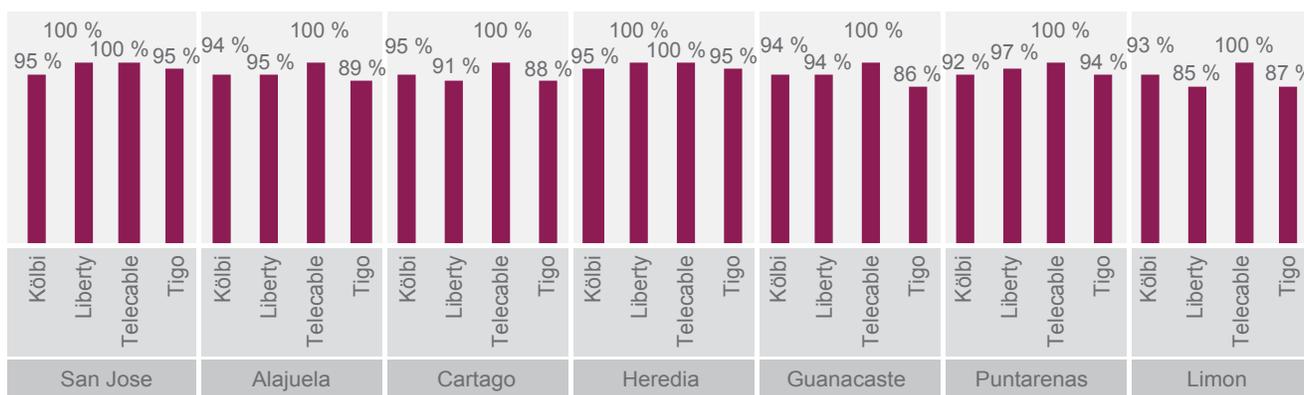
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

TABLE 20. COSTA RICA: Results by province for download speed compared to contracted speed, 2021-2024

(figures in percentage terms)

Province	Operator	2021	2022	2023	2024
San Jose	Kölbi	82 %	87 %	97 %	95 %
	Liberty	77 %	98 %	94 %	100 %
	Telecable	79 %	91 %	100 %	100 %
	Tigo	87 %	93 %	100 %	95 %
Alajuela	Kölbi	86 %	90 %	96 %	94 %
	Liberty	77 %	98 %	91 %	95 %
	Telecable	82 %	83 %	100 %	100 %
	Tigo	79 %	93 %	100 %	89 %
Cartago	Kölbi	78 %	84 %	95 %	95 %
	Liberty	83 %	99 %	91 %	91 %
	Telecable	84 %	92 %	100 %	100 %
	Tigo	81 %	92 %	100 %	88 %
Heredia	Kölbi	91 %	94 %	100 %	95 %
	Liberty	80 %	99 %	94 %	100 %
	Telecable	73 %	84 %	100 %	100 %
	Tigo	83 %	92 %	100 %	95 %
Guanacaste	Kölbi	85 %	89 %	93 %	94 %
	Liberty	76 %	98 %	91 %	94 %
	Telecable	81 %	98 %	88 %	100 %
	Tigo	72 %	90 %	98%	86 %
Puntarenas	Kölbi	81 %	83 %	94 %	92 %
	Liberty	75 %	94 %	91 %	97 %
	Telecable	82 %	88 %	100 %	100 %
	Tigo	82 %	91 %	99 %	94 %
Limon	Kölbi	89 %	89 %	93 %	93 %
	Liberty	73 %	97 %	83 %	85 %
	Telecable				100 %
	Tigo	83 %	86 %	97 %	87 %

Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 219. COSTA RICA: Result of sending speed compared to contracted speed, 2021−2024

(figures in percentage terms)
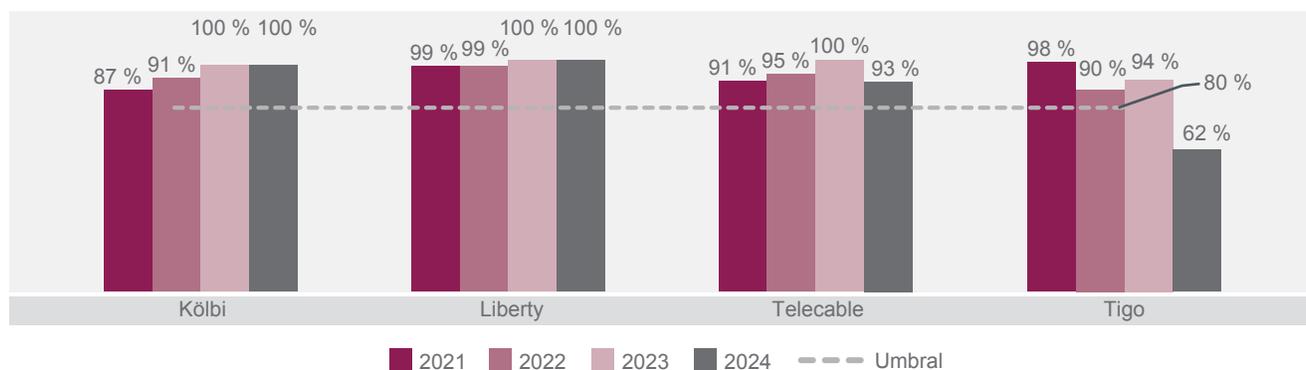
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 220. COSTA RICA: Result by province of sending speed compared to contracted speed, 2024

(figures in percentage terms)

Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

TABLE 21. COSTA RICA: Result by province of sending speed compared to contracted speed, 2021-2024

(figures in percentage terms)

Province	Operator	2021	2022	2023	2024
San Jose	Kölbi	89 %	90 %	100 %	100 %
	Liberty	99 %	99 %	99 %	100 %
	Telecable	91 %	92 %	100 %	93 %
	Tigo	99 %	90 %	98 %	62 %
Alajuela	Kölbi	86 %	91 %	100%	100 %
	Liberty	99 %	97 %	100 %	100 %
	Telecable	92 %	97 %	99 %	90 %
	Tigo	98 %	88 %	89 %	60 %

Province	Operator	2021	2022	2023	2024
Cartago	Kölbi	80 %	87 %	100 %	100 %
	Liberty	100 %	100 %	98 %	100 %
	Telecable	90 %	98 %	100 %	97 %
	Tigo	99 %	90 %	92 %	64 %
Heredia	Kölbi	89 %	96 %	100 %	100 %
	Liberty	99 %	99 %	99 %	100 %
	Telecable	93 %	99 %	97 %	95 %
	Tigo	99 %	90 %	95 %	61 %
Guanacaste	Kölbi	89 %	91 %	100 %	100 %
	Liberty	97 %	98 %	99 %	100 %
	Telecable	89 %	100 %	83 %	85 %
	Tigo	99 %	90 %	93 %	64 %
Puntarenas	Kölbi	86 %	89 %	97 %	100 %
	Liberty	100 %	99 %	100 %	100 %
	Telecable	96 %	98 %	97 %	88 %
	Tigo	92 %	83 %	88 %	71 %
Limon	Kölbi	89 %	89 %	100 %	100 %
	Liberty	100 %	99 %	98 %	100 %
	Telecable				98 %
	Tigo	98 %	90 %	100 %	73 %

Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 221. COSTA RICA: Measurements that coincide with the 2G coverage reported by the operator in 2023
(figures in percentage terms)
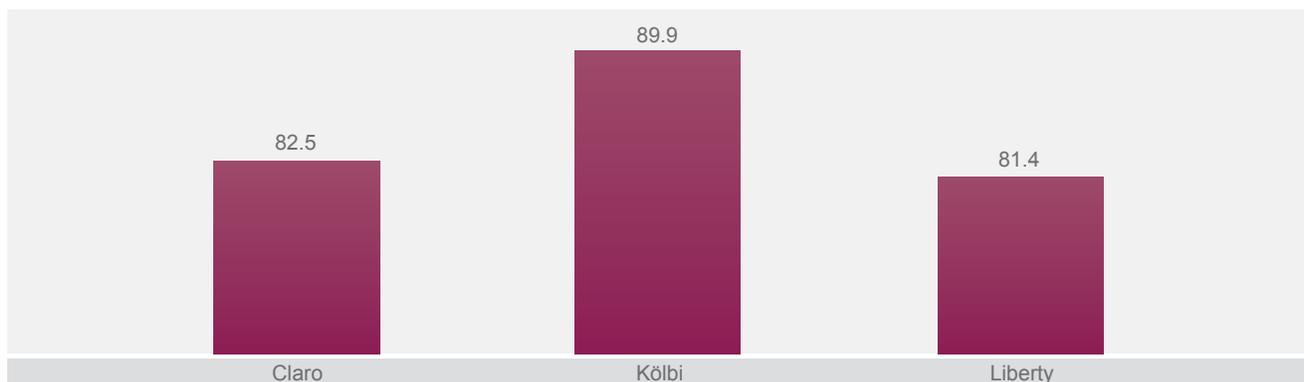
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 222. COSTA RICA: Measurements that coincide with the 3G coverage reported by the operator in 2023
(figures in percentage terms)

Claro	Kölbi	Liberty
90.6	91.6	91.8

Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 223. COSTA RICA: Measurements that coincide with the 4G coverage reported by the operator in 2023
(figures in percentage terms)

Claro	Kölbi	Liberty
81.8	81.9	92.5
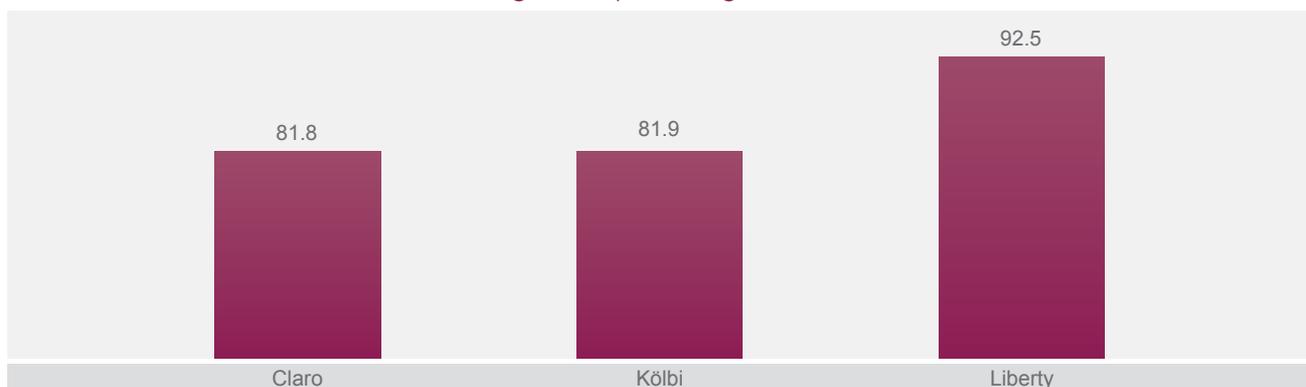
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 224. COSTA RICA: Number of unsuccessful call attempts in 2023
(figures in percentage terms)

2G			3G		
Claro	Kölbi	Liberty	Claro	Kölbi	Liberty
2.5	3.5	2.6	1.3	2.8	1.8
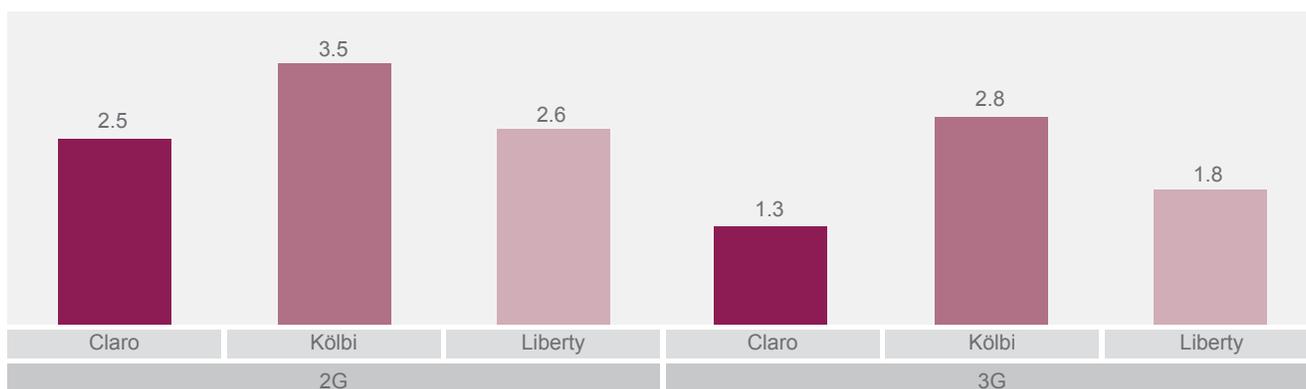
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 225. COSTA RICA: Calls interrupted before their normal completion, 2023
(figures in percentage terms)

Claro	Kölbi	Liberty	Claro	Kölbi	Liberty
6.1	2.4	3.6	1.3	3.2	1.8
2G			3G		
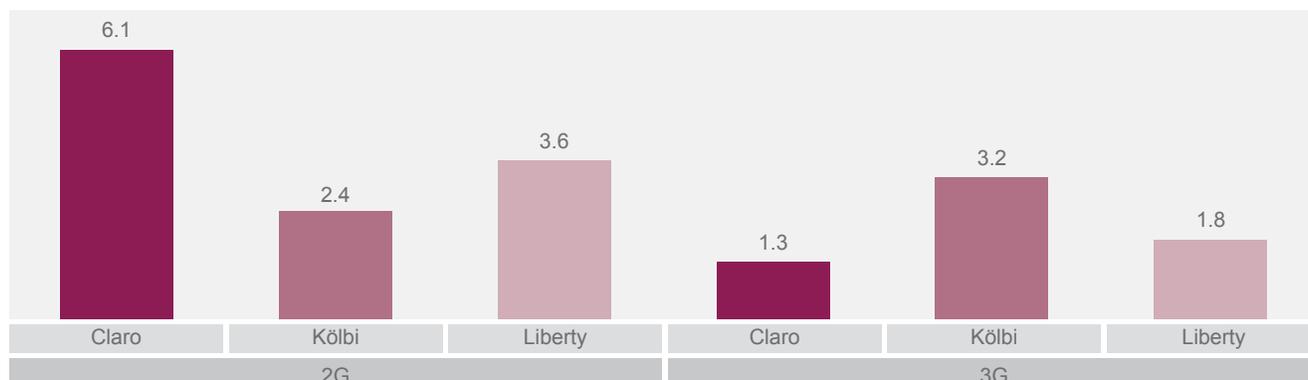
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 226. COSTA RICA: Call setup time, 2023
(figures in seconds)

Claro	Kölbi	Liberty	Claro	Kölbi	Liberty
4.6	3.3	4.7	4.9	3.4	3.3
2G			3G		
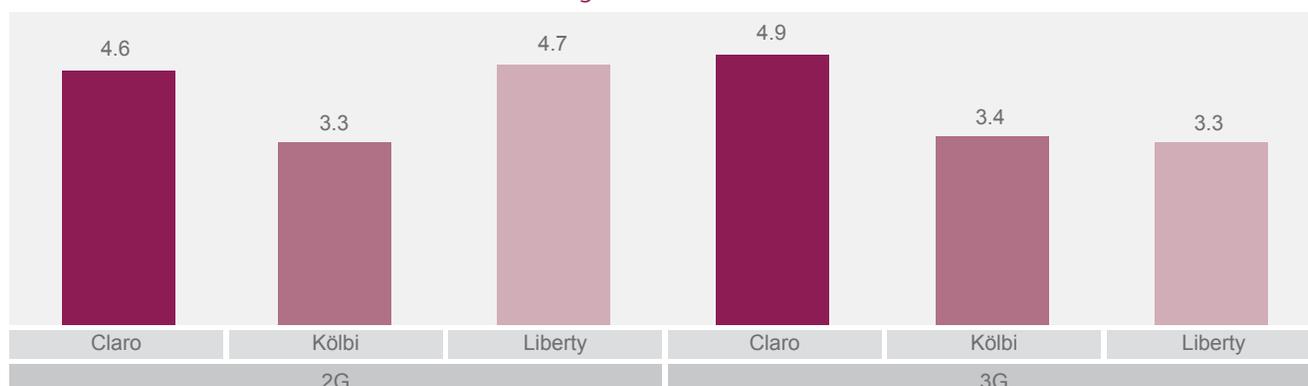
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 227. COSTA RICA: Voice quality mean opinion score (MOS), 2023
(figures are expressed on a scale of 1 to 5)

Claro	Kölbi	Liberty	Claro	Kölbi	Liberty
3.4	3.2	3.6	3.2	3.4	3.6
2G			3G		
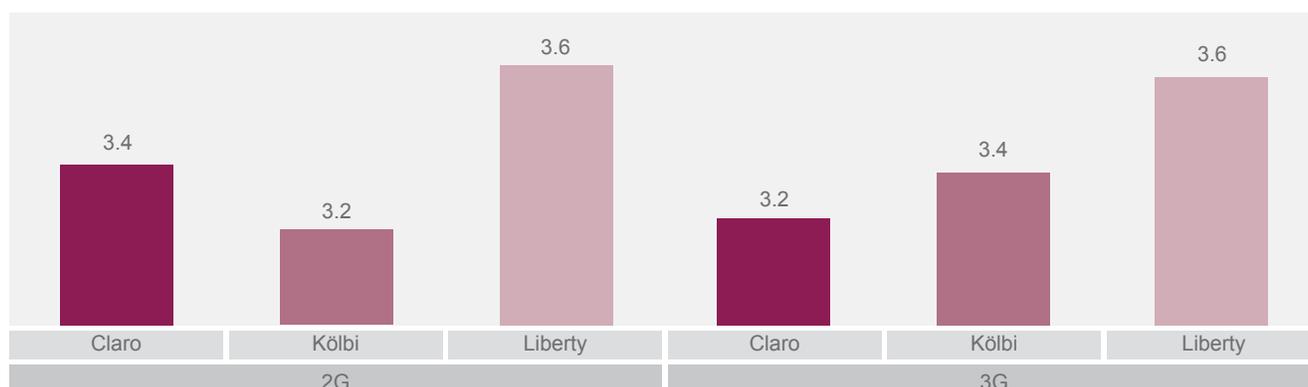
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 228. COSTA RICA: National local latency in 3G and 4G networks, 2023
(figures in milliseconds)

Claro	Kölbi	Liberty	Claro	Kölbi	Liberty
95.2	50.0	58.0	35.5	35.9	32.4
3G			4G		
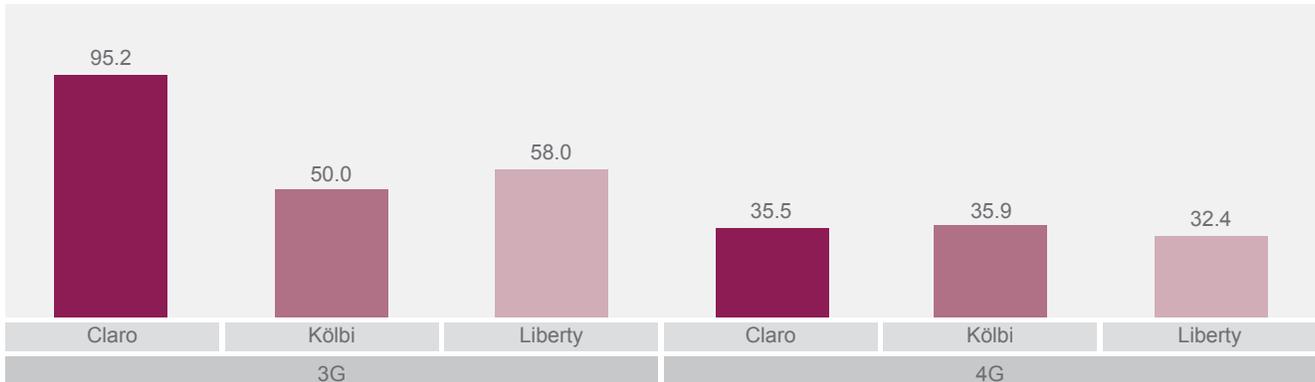
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 229. COSTA RICA: Average download speed of 3G and 4G networks, 2023
(figures in Mbps)

	Claro	Kölbi	Liberty
3G	3.6	4.1	4.6
4G	19.8	21.8	23.6

■ 3G   ■ 4G
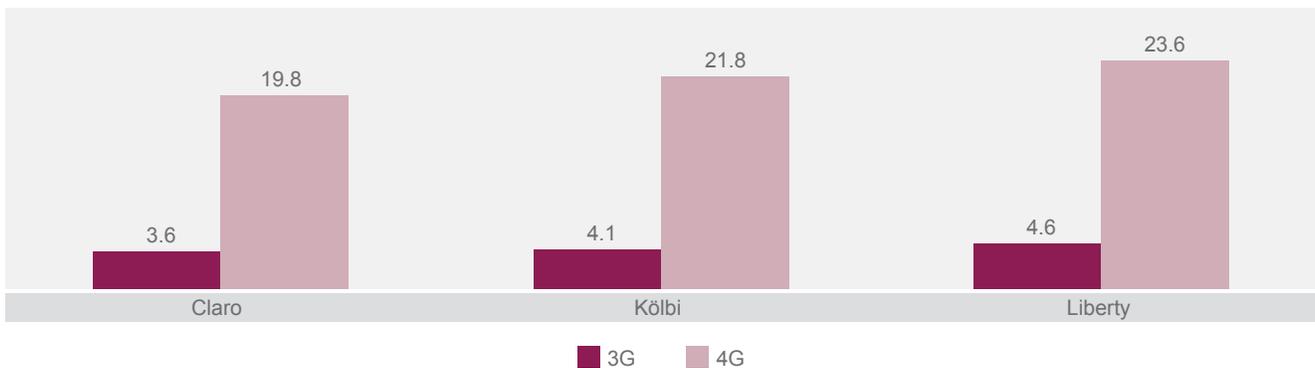
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 230. COSTA RICA: Average upload speed of 3G and 4G networks, 2023
(figures in Mbps)

	Claro	Kölbi	Liberty
3G	1.6	1.5	0.5
4G	15.2	15.5	20.4

■ 3G   ■ 4G
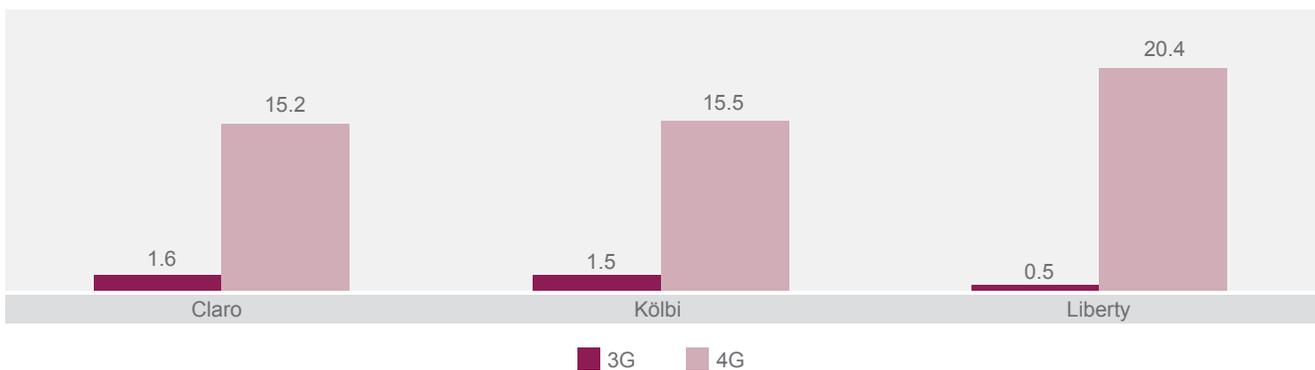
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 231. COSTA RICA: Download speed in 3G networks, 2019-2024
(figures in Mbps)

	I S	II S	I S	II S	I S	II S	I S	II S	I S	II S	I S	II S
	2019	2019	2020	2020	2021	2021	2022	2022	2023	2023	2024	2024

— Kölbi   — Claro   ••••• Liberty
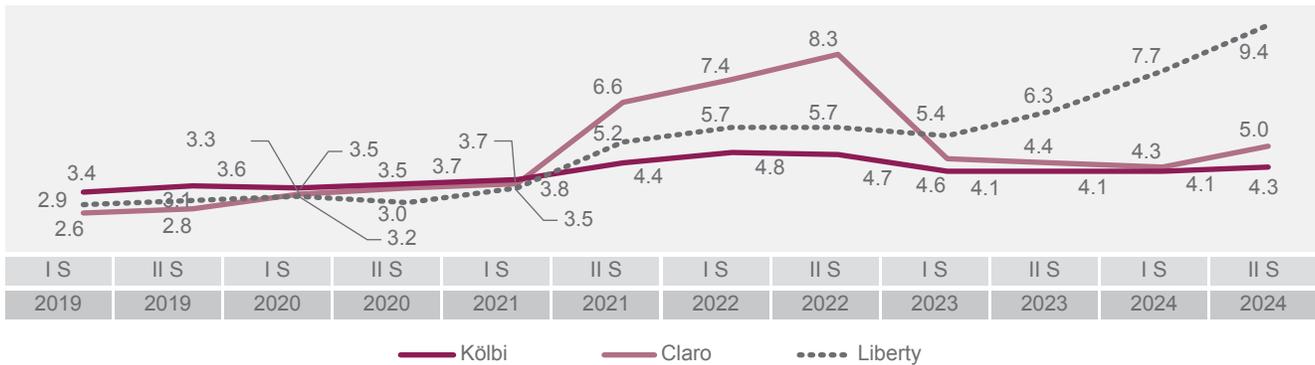
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 232. COSTA RICA: Download speed in 4G networks, 2019-2024
(figures in Mbps)

	I S	II S	I S	II S	I S	II S	I S	II S	I S	II S	I S	II S
	2019	2019	2020	2020	2021	2021	2022	2022	2023	2023	2024	2024

— Kölbi   — Claro   ••••• Liberty
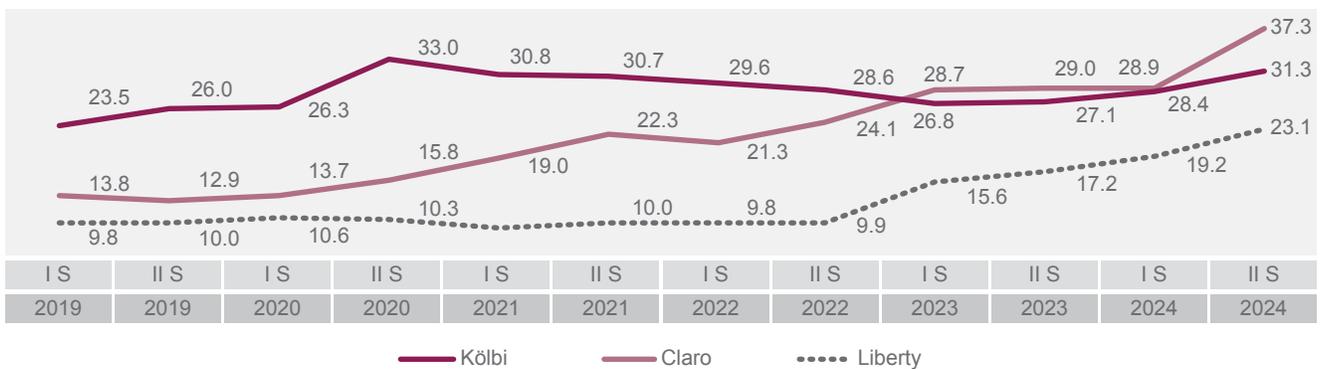
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

GRAPH 233. COSTA RICA: Percentage of time spent connected to 4G networks 2018 - 2024
(figures in percentage terms)

	I S	II S	I S	II S	I S	II S	I S	II S	I S	II S	I S	II S	I S	II S
	2018	2018	2019	2019	2020	2020	2021	2021	2022	2022	2023	2023	2024	2024

— Kölbi   — Claro   ••••• Liberty
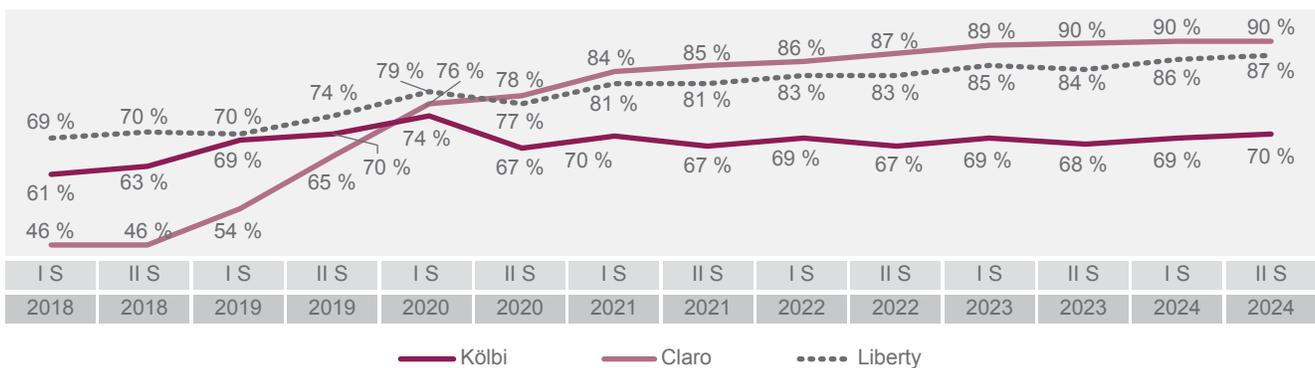
Source: SUTEL, Directorate of Quality. Costa Rica, 2024.

FONATEL

AGGREGATE RESULTS

In 2024, the Superintendency of Telecommunications (SUTEL) celebrated 12 years of coordinating programs and projects in an effort to bridge the digital divide in accordance with the objectives set forth in the General Telecommunications Act (LGT as per its acronym in Spanish), Act No. 8642, and the goals and priorities of public policy established in the National Telecommunications Development Plan (PNDT as per its acronym in Spanish).

The portfolio of programs and projects of the National Telecommunications Fund (FONATEL) is currently comprised of 5 programs and 46 projects, ranging from subsidies to expand access to and ownership of telecommunications services to the provision of devices and technological solutions for the use and enjoyment of these services by the target populations. This logical interlocking of FONATEL programs and projects generates effects and impacts on the access and use dimensions of the Digital Divide Index and indirectly on the education dimension of this index.

The findings shown below summarize the results of the Connected Communities Program, the Connected Households Program, the Provisioned Public Centers Program, the Connected Public Spaces Program, and the Bicentennial Education Network Program from 2015 to 2024[36].

> **"**
> ## FONATEL's portfolio of programs and projects comprises 5 programs and 46 projects
> **"**

Goal achievement indicators of the National Telecommunications Development Plan (PNDT)

The 2022-2027 PNDT, published on December 15, 2022, contains nine goals pertaining to universal access, universal services, and solidarity (i.e.: Goals No. 3, 4, 5, 6, 7, 18, 19, 20 and 21). Of these, four were previously introduced in the 2015-2021 PNDT (i.e.: Goals No. 3, 4, 5 and 7), and five are entirely new (i.e.: Goals No. 6, 18, 19, 20 and 21). Moreover, Goal No. 6 brings continuity to one of the results of the Connected Communities Program concerning the connectivity of the Centers for the Provision of Public Services (CPSP as per its acronym in Spanish).

The PNDT was published before an action plan[37] had been developed for Goals No. 5, 6, 7, 18, 19, 20 and 21. In addition, despite significant efforts by SUTEL to ensure that the sector's planning instrument is completed and signed by the institutions responsible for these six goals, the only action plans that have been finalized are in relation to Goals No. 3, 4, 5 and 18. Goals 3 and 4 are the sole responsibility of SUTEL/FONATEL, goal 5 is the responsibility of SUTEL/FONATEL and the MEP, and goal 18 is the responsibility of SUTEL/FONATEL together with the Education and Nutrition Centers and the Children's Comprehensive Care Centers (CEN-CINAI as per its acronym in Spanish).

In light of the above, the progress percentage for each of the 2022-2027 PNDT's annual and overall goals was recorded in 2024:

- Goal No. 3: 100 % of the annual goal has been completed, and 71 % of the 2026 overall goal has been completed. The action plan has been signed and slated for 2024.

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36   The description of FONATEL programs is available in the Methodology section of this report, under *Methodology applied in the monitoring and evaluation system for programs and projects financed with FONATEL resources and compliance with the National Telecommunications Development Plan targets*.
37   In accordance with the methodology of the Monitoring, Evaluation, and Modification processes of the 2022-2027 PNDT: "The Ministry of Science, Innovation, Technology and Telecommunications (MICITT as per its acronym in Spanish) is responsible for defining and designing a template for a Goal's Action Plan, which is a tool that is used to implement said goals and to serve as a foundation for the M&E processes assigned to the MICITT". (M&E = Monitoring and Evaluation) A proper definition for "action plan" is not provided in the "Methodology" section of this report. However, an action plan is a document that defines the scope of a goal, namely: description, objectives, legal basis, methodology, timetable, budget, monitoring indicator, risks, and the roles and responsibilities of the stakeholders.

- Goal No. 4: 94 % of the annual goal has been completed, and 50 % of the 2026 overall goal has been completed. The action plan has been signed, but the timetable for 2024 has not been decided[38].

- Goal No. 5: 38.2 % of the 2027 overall goal has been completed. The action plan has been signed and slated for 2024[39].

- Goal No. 6: 78 % progress toward the annual goal and 41 % toward the overall goal. It has a schedule through 2024, but no signed action plan.[40] This progress stems from the CPSP connectivity initiative launched as part of the Connected Communities Program under Goal 1 of the 2015-2021 PNDT.

- Goal No. 7: 100 % of the annual goal and the 2024 overall goal has been completed[41]. No action plan has been signed.

- Goal No. 18: 15 % of the 2024 overall goal has been completed. The progress made thus far is the result of ongoing efforts made as part of the 2015-2021 PNDT's Goal No. 9. There is no goal programming for 2024, as the action plan is pending approval by MICITT[42].

- Goals 19 and 20: There is no goal schedule nor action plan for 2024[43]. There was no progress in 2024.

- Goal No. 21: 75 % of the overall goal has been completed. The progress made thus far is the result of ongoing efforts made as part of the 2015-2021 PNDT's Goal No. 9. The action plan has not been signed and the timetable for 2024 has not been decided[44].

Table No. 22 presents the nine goals of universal access, universal service, and solidarity contained in the PNDT 2022-2027, assigned to the programs being implemented by FONATEL, with their respective descriptions, the current goals per year and progress to 2024, as well as the annual and overall compliance percentage. This table does not include the progress percentages of Goals No. 5 and 13, which were set forth in 2015-2021 PNDT, as this document is no longer in effect. However, the subsidies provided in accordance to the scope of both of these projects are in the "in-progress" phase.

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38   The request to adjust the matrix for this goal in the 2022-2027 PNDT is pending approval, within the framework of the change in the methodology for its fulfillment. SUTEL decided to change the management model for coverage of the 134 districts prioritized by MICITT in the PNDT 2022-2027, moving from financing the Universal Service Payment Deficit (DPSU per its acronym in Spanish) solely with FONATEL resources to a mixed financing model with public and private resources, through the incorporation of coverage obligations in the terms and conditions for the auction of radio spectrum for the development of 5G.

39   The action plan for goal no. 5 of the PNDT 2022-2027 was signed by SUTEL and MEP in July 2024 and submitted to MICITT through official letter No. 06605-SUTEL-CS-2024, dated July 31, 2024. According to this action plan, goal no. 5 would be 100 % achieved by 2028, due to delays in the provision of input information for the construction of this action plan by the MEP. This action plan sets the target progress for 2024 at 40 %, which means 95 % compliance with this target. However, at the close of this report, this modification had not been included by MICITT in the PNDT.

40   On December 6, 2024 (official letter MICITT-DVCTI-OF-1820-2024), the MICITT provided the pending information for the development of the action plan for this target. Review and approval by the MICITT/CECI and the National Directorate of Cen-Cinai are pending.

41   Goal No. 7 of the 2015-2021 PNDT closed in 2023 with 84 % progress: "Partially Achieved Goal (PAG)" according to the "Methodology of the Monitoring, Evaluation, and Modification processes of the 2022-2027 PNDT." Compliance with this goal was seriously affected by the low effectiveness of the database of potential program beneficiaries, due to outdated contact information and problems with the quality of this information, limitations that have been noted and documented by SUTEL since 2020.

42   By means of Council Agreement 008-040-2023 (05729-SUTEL-SCS-2023), the SUTEL Council refers the approval of the action plan for target 18 and its annexes to the MICITT.

43   By means of official letter CONAPDIS-DE-2637-2024 dated November 13, 2024, CONAPDIS sent the information necessary for the construction of the action plan for goal 19. The correction of observations is pending. In the case of goal 20, the approval of the action plan by the highest authority of the MEP is pending.

44   By means of official letter MICITT-DVCTI-OF-1895-2024 dated December 20, 2024, the Deputy Minister of Science, Innovation, and Technology provided the pending information for the development of the action plan. Review and approval by MICITT are pending in order to proceed with the signing.

Management indicators

As indicated above, FONATEL has five programs, which in turn comprise 46 projects in different phases of their life cycle[45], representing an increase of twelve projects compared to 2023, due to the inclusion of new projects.

Of the 46 projects, 39 (85 %) belong to the Connected Communities Program, which is responsible for bringing connectivity to rural areas and areas that are not economically profitable for the market, representing an increase of 11 new projects. In total, there are 34 projects (74 %) in the in-progress phase, which correspond to projects under development in which management, control, and monitoring processes are applied (see Graph No. 234).

The projects in the closure phase are Roxana, Pacuarito, and El Mastate of the Connected Communities Program, awarded to the Instituto Costarricense de Electricidad (ICE), Telefónica de Costa Rica TC, S.A. (currently Liberty Telecomunicaciones de Costa Rica LY, S.A.)[46], and Telecable, S.A., respectively, in addition to the first project of the Provisioned Public Centers Program. The Guatuso and Los Chiles projects, awarded to Telefónica de Costa Rica TC, S.A., were declared in the closure phase in 2020; however, since May 2021[47], they have been extended annually for an additional period, allowing connectivity to continue to be provided to eight districts and the connection of 132 Centers for the Provision of Public Services (CPSP as per its acronym in Spanish) for an additional five years.

The five programs being implemented with FONATEL resources were present in 491[48] of the 492 existing districts, with Cocos Island being the only district without these programs, representing 100 % of the country's total districts (see Graph No. 235). Of the districts with FONATEL programs, 3 % have a single program in operation, 17 % have two programs, 46 % have three, 23 % have four, and 11 % have five. This is important considering that all programs complement each other in providing solutions to bridge the digital divide across various communities.

Thanks to the programs financed with FONATEL resources, 310,201 devices for ICT access and use have been distributed, of which 60 % were delivered through the Connected Households program and the remaining 40 % through the Provisioned Public Centers program (see Graph No. 236), generating greater broadband technological solutions for the comprehensive reduction of the digital divide. Moreover, FONATEL was able to bring the Connected Communities Program, the Provisioned Public Centers Program, and the Education Network Program to a total of 8989 Centers for the Provision of Public Services (CPSP as per its acronym in Spanish), which represented an increase of 1 % (59) more centers in relation to 2023 (see Graph No. 237).

Beneficiary indicators

The Connected Communities and Connected Households programs have helped to increase connectivity in geographic areas with no or partial connectivity that are unprofitable for operators and providers to provide telecommunications services (rural areas, areas with low population density, indigenous territories, etc.), as well as low-income population groups.

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45 For additional details on the phases of the programs and projects, please refer to the Methodology section of this report, specifically the section on the methodology applied in the monitoring and evaluation system for programs and projects financed with FONATEL resources and compliance with the goals of the National Telecommunications Development Plan.

46 By means of Resolution RCS-247-2022 of September 30, 2022, the SUTEL Council authorized the registration of the change of name of the company Telefónica de Costa Rica TC S.A. to Liberty Telecomunicaciones de Costa Rica LY S.A.

47 The projects in Guatuso and Los Chiles were extended for an additional year by way of an addendum to the original contract, which was signed on May 17, 2021.

48 Districts with at least one project under development due to a program funded by FONATEL with (total or partial) connectivity to voice and data services, or with at least one household who has benefited from an Internet service subsidy and a device with which to use this service, or with a CPSP that has devices for accessing and using ICTs, or with a free Internet access zone, or with an education center connected to the Education Network.

"At the end of 2024, 532,909 households (29 % of households in the country) were registered as beneficiaries[49], which translates into 1,790,813 inhabitants (34 % of the country's population) with access to voice and data services in districts where programs developed with FONATEL[50] resources are present"

This represents a positive variation of 3 % in the number of households and 2 % in the number of inhabitants with access to voice and data services, compared to 2023 (see Graph No. 238).

The resources provided by FONATEL to the different programs under development were invested to make telecommunication services ubiquitous, and to expand access to these services nationwide. With the resources invested in the execution of the projects, by the end of 2024, 3,725 subscriptions to fixed telephone service and 272,106 subscriptions to fixed Internet service had been generated. These results represent a 34 % decrease in fixed telephone subscriptions and a 1 % increase in fixed Internet subscriptions compared to 2023 (see Graph No. 239).

This means that 15 out of every 100 housing units in the country have fixed voice and data services through programs developed with FONATEL resources, contributing 0.6 % to the market penetration of fixed telephone service and 22.8 % to the penetration of fixed Internet service per housing unit.

Mobile subscriptions generated through the telecommunications infrastructure subsidized with FONATEL resources reached 171,620 in 2024, 76 % more than those registered in 2023.

In total, by year-end 2024, 1,356,902 people were given access to voice and data services due to programs funded with FONATEL resources, an increase of 4 % in relation to 2023 (see Graph No. 240). This means that FONATEL programs benefit 26 % of the national population.

Financial indicators

The total value of the Fund's assets as of December 2024 was 92,680 million colones, 12,241 million colones (12 %) less than the value of the Fund in 2023 (see Graph No. 241). The reduction is mainly due to the outflow of resources via investments made during 2024 for the development and maintenance of projects aimed at reducing the digital divide, which is the Fund's objective.

The amount of financial commitments for programs executed with FONATEL resources, estimated at 162,724 million colones in 2029, exceeds the Fund's equity by 70,041 million colones. This means that the Fund's assets in 2024 are equivalent to 57 % of the amount committed to finance actions related to maintaining the subsidy terms established in the formulation of each of the programs. The deficit between FONATEL's financial commitments and its equity must be offset with new resources by increasing the Special Parafiscal Contribution.

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49 This refers to the number of households per district with access to voice and data services provided through the Connected Communities and Connected Households programs. The number of households benefiting from the Connected Communities program is estimated by dividing the total population of districts with access to voice and data services provided by this program, obtained from district population projections published by the National Institute of Statistics and Censuses (INEC), by the number of people per household estimated in the National Household Survey (ENAHO), published by INEC, namely: 3.19 (2020), 3.10 (2021), 3.01 (2022), 2.94 (2023), and 2.91 (2024) persons per household. The number of households benefiting from the Connected Households program corresponds to the households that received the program's benefits. If a given district has at least one project under development due to the Connected Communities Program and/or the Connected Households Program, only the total number of households in the district will be considered for calculation purposes.
50 The programs that provide access to telecommunications services to households are Connected Communities and Connected Households.

According to the latest data provided by the Ministry of Finance, the collection of the Special Parafiscal Contribution (CEPF) as of December 2024, corresponding to the 2023 period, totaled 14,119 million colones, which is less than half (46 %) of the investment executed in the same period. CEPF revenue in 2024 decreased by 166 million colones (1 %) compared to the amount collected in 2023 (see Graph No. 242).

Meanwhile, investment by programs in operation during 2024 amounted to 30,279 million colones, equivalent to 33 % of the Fund's total assets in that same year. The execution of resources in 2024 represented a difference of 18,474 million colones (38 %) less than the investment executed in 2023, although cumulatively, the investment executed in the management of programs and projects developed with FONATEL resources reached a nominal figure of 271,277 million colones (see Graph No. 243). The decrease in investment in 2024 is mainly due to the following factors:

a) The Connected Communities Program projects are close to completing all of the planned telecommunications infrastructure and the time frame for the subsidy period for Centers for the Provision of Public Services, as set out in goals 1 and 2 of the 2015-2021 PNDT, as well as goals 3 and 4 of the 2022-2027 PNDT, which implies a lower execution of resources for CAPEX and OPEX.

b) Coverage of the 134 districts prioritized by MICITT in the PNDT 2022-2027 is intended to be carried out within the framework of the radio spectrum bidding process for the provision of 5G networks.

c) The provision of equipment through the Provisioned Public Centers Program was completed, and, in addition, the number of free Internet access zones (ZAIG as per its acronym in Spanish) under the Connected Public Spaces Program, which are reaching the end of their subsidy period, has increased.

d) Because the Action Plan for the Education Network program goal was signed in July 2024[51], the award process began during the second half of the year,

which prevented progress on the implementation of this program in 2024.

e) There are five goals without a signed action plan, meaning that SUTEL/FONATEL is unclear about the scope of the need to be addressed. Goal 7 was 100 % achieved in September 2024 without an action plan. This was possible because it originated in the previous PNDT and, therefore, already had a FONATEL project underway. However, goal 5 experienced significant delays due to the absence of an action plan, as this instrument was required to begin profiling and tendering for the education centers pending attention. The case of goals 6, 19, 20, and 21 is more complex, as they have not made any progress during the current PNDT due to the lack of an action plan. By the fourth quarter of 2024, the need to address these goals was identified by the co-responsible and beneficiary institutions, namely: MICITT/CECI, National Directorate of CEN-CINAI, CONAPDIS, and CENAREC.

f) In the 2024 period, ICE submitted the deliverables of the financial audits supporting the accounting of the projects awarded under goal 1 of the 2015-2021 PNDT, corresponding to the 2020 and 2021 periods, which were requested to be corrected as a result of the reviews and reconciliations carried out by the DGF.

g) Delay in the verification process of free operating cash flows due to pending information to be submitted and approved from the financial audits for the periods from 2020 to 2023.

In 2024, resources were executed in four of the five programs, with the Connected Households Program executing the largest amount of financial resources cumulatively, reaching 127,712 million colones between 2016 and 2024, corresponding to 47 % of the total FONATEL resources invested in the execution of programs and projects (see Graph No. 244). Of the four programs with investments executed in 2024, the Connected Communities and Education Network programs showed an increase compared to 2023 of 3,135 (108 %) and 20 (0.3 %) million colones, respectively.

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51 Approved by the SUTEL Council through agreement 011-032-2024 of July 31, 2024.

The FONATEL resources that were allocated in 2024 were distributed among 13 different network operators and service providers, namely: Radiográfica Costarricense S. A. (RACSA), Instituto Costarricense de Electricidad (ICE), Telecable S. A. (Telecable), Liberty Telecomunicaciones de Costa Rica LY, S. A. (Liberty), Millicom Cable Costa Rica S. A. (Tigo), Cooperativa de Electrificación Rural de Guanacaste R. L. (Coopeguanacaste), Claro CR Telecomunicaciones S. A. (Claro), Cooperativa de Electrificación Rural de San Carlos R. L. (Coopelesca), Cooperativa de Electrificación Rural de Los Santos R. L. (Coopesantos), Cooperativa de Electrificación Rural de Zarcero R. L. (Coopealfaroruiz), Servicios Femarroca (Teki o Cable Pacayas), Cable Caribe S. A. (Cable Caribe), and Cinema Turrialba S. A. (Cable Net).

The operator with the highest cumulative amount of financial resources executed is RACSA (23 %), however, in 2024, ICE was the operator with the largest investment executed, equivalent to 26 % of the total, with ICE and Cable Caribe being the only operators that showed a positive variation in the execution of resources between 2023 and 2024, with increases of 65 % and 344 %, respectively. By 2024, 77 % of the investment was executed through the operators ICE/RACSA, Telecable, and Coopeguanacaste (see Graph No. 245)[52].

RESULTS PER PROGRAM

The following are the main results on the performance of each of the programs that make up the FONATEL portfolio, cumulatively until the end of 2024.

Connected Communities Program (PCC)

Goal achievement indicators of the National Telecommunications Development Plan (PNDT)

The 2022-2027 PNDT will continue to pursue the 2015-2021 PNDT's Goals No. 1 and 2 through Goals No. 3 and 4, respectively, in an effort to expand coverage in 24 indigenous territories across the country, and with the purpose of deploying telecommunications infrastructure in 262 low economic profitability districts.

By the end of 2024, the Connected Communities Program had brought access to telecommunications services to 130 districts and 16 indigenous territories in the country,

in addition to the Quitirrisí territory, which is covered by commercial services[53], thus expanding the coverage of these services, which has a direct effect on reducing the digital divide. These results represent

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52 The data presented corresponds to figures rounded to the nearest unit, which means that in some cases the sum is greater than 100.

53 The Quitirrisí indigenous territory has access to telecommunications services as a result of market expansion. SUTEL plans to conduct on-site inspections to determine whether FONATEL resources are needed to ensure that the entire population of this territory has access to telecommunications services. This territory is part of the baseline for the indicator aimed at measuring the number of territories with access to telecommunications services in Goal 3 of the 2022-2027 PNDT, and is therefore counted among the indigenous territories with access to telecommunications services; however, it should be noted that it has not been intervened with FONATEL resources.

100 % progress in meeting goal No. 3 of the 2022-2027 PNDT by 2024 and 71 % progress in meeting this goal by 2026 (see Graph No. 246), as well as 94 % progress toward goal No. 4 by 2024 and 50 % progress toward this goal by 2027[54] (see Graph No. 247). With regard to 2023, the number of indigenous districts and territories with access to telecommunications services increased by 2 % (2 districts) and 21 % (3 territories), respectively.

The districts with (total or partial) connectivity that were given access to voice and data services due to this program are spread across the five peripheral regions of the country and throughout all seven provinces (see Map No. 1). The Brunca and Chorotega regions cover the largest number of districts (54 %). Indigenous territories with connectivity (partial or total) and access to voice and data services are located in the northern and southern regions of the country, with the Brunca and Huetar Caribe regions covering the majority (82 %) of these territories (see Map No. 2). Access to voice and data services provided by this program covers 26 % of all districts and 71 % of the country's indigenous territories (see Graph No. 248).

The Connected Communities Program comprises a 39-project portfolio, 11 more than in 2023. Until 2022, the composition of the Connected Communities Program project portfolio remained unchanged; however, in 2024, six projects were included in the planning phase, there was an increase of three projects in the execution phase, and one more project in the closure phase, compared to 2023 (see Graph No. 249). Projects in the execution phase continue to represent the majority (74 % of the total project portfolio for this program).

During the year 2024, as part of the Connected Communities Program, 33 additional sites with telecommunications infrastructure were put into operation, reaching a total of 715[55], of which 20 correspond to fiber optic nodes. This infrastructure provides connectivity to 130 districts and 16 indigenous territories in the country. The infrastructure made available in 2024 represented an increase of 5 % in the number of towers in operation in relation to 2023[56]. The Central Pacific region showed the highest growth (20 %) in the number of sites with infrastructure between 2023 and 2024, with 17 additional sites, representing 52 % of sites commissioned during 2024. This increase was mainly due to the deployment of infrastructure within the Los Ángeles project in Parrita, in addition to the progress of projects providing coverage to indigenous territories in the Huetar Caribe and Brunca regions (see Graph No. 250).

In indigenous territories, 15 telecommunications towers were commissioned during 2024, 29 % less than in 2023. However, cumulatively, the infrastructure deployed in these territories through the Connected Communities Program reached 65 enabled telecommunications towers, representing 9 % of the total infrastructure enabled in this program (see Graph No. 251). The towers commissioned in 2024 made it possible to extend telecommunications service coverage to three additional indigenous territories. Most of the towers in operation (74 %) provide coverage to the Bribrí and Cabécar ethnic groups' territories.

The scope of the Connected Communities Program projects also includes connectivity for Centers for the Provision of Public Services (CPSP), which increased by 3 % between 2023 and 2024, corresponding to 59 additional CPSPs with connectivity provided by FONATEL. In total, by the end of 2024, the program will have subsidized the connection and monthly consumption of fixed voice and data services for five years to 1,975 CPSPs, of which 1,332 remain active[57].

Of these CPSPs, the majority (91 %) correspond to education centers of the Ministry of Public Education (MEP), although Education and Nutrition Centers and Children's Comprehensive Care Centers (CEN-CINAI) administered by the Ministry of Health, health centers of the Social Security Administration of Costa Rica

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54   The remaining districts will be served through the deployment of 5G networks, which were included in the radio spectrum auction held by SUTEL in January 2025 as part of the coverage obligations in the 700 MHz band.
55   This value includes newly built telecommunications towers and existing towers adapted with new equipment, as well as fiber optic nodes.
56   The data for 2021, 2022, and 2023 were adjusted because two towers were found to be duplicated due to being equipped twice, and fiber optic nodes were added to the accounting.
57   CPSPs that do not have active service are those that have reached the end of the subsidy period, where the responsible institution requested the disconnection of services, or, in the case of educational centers, were transferred to the Education Network program.

(CCSS), and Intelligence Community Centers (CECI) managed by MICITT have also benefited (see Graph No. 252). In all institutions, there was an increase of 1 % to 15 % in the number of CPSPs benefiting between 2023 and 2024, with education centers showing the greatest variation (50 centers).

In indigenous territories, 36 new CPSPs benefited from this program in 2024, reaching a total of 105 CPSPs. This result represents an increase of 71 % between 2023 and 2024 (see Graph No. 253). Most of these centers (71 %) are located in indigenous territories of the Bribri and Cabécar ethnic groups.

Beneficiary indicators

The infrastructure deployed under the Connected Communities Program has made it possible to increase universal access to telecommunications services, expanding the number of inhabitants with access to voice and data services in geographical areas where the cost of installing and maintaining telecommunications infrastructure makes the provision of these services unprofitable for operators and providers (rural areas and indigenous territories).

130 districts and 1,001,348 inhabitants were provided access to voice and data services in 2024,

which represents an increase of 4 %, or 34 881 inhabitants, in relation to the previous year. The increase in coverage in these districts made it possible to extend telecommunication services to 341,068 housing units, which represents an increase of 14,447 (4 %) housing units in relation to 2023 (see Graph No. 254).

In terms of service usage, in 2024, a total of 32,711 housing units subscribed to fixed voice and data services provided through the Connected Communities

Program, and 171,620 people subscribed to mobile services, for a total of 207,990 subscriptions, 48 % more than in 2023. With that in mind, it should be noted that the projects that were awarded under the Connected Communities Program originally stipulated that extending the coverage of fixed telephony and fixed Internet services was a contractual obligation. In some of these areas, however, the operators who were awarded the project implemented a comprehensive solution that allowed for the provision of fixed and mobile voice and data services. In accordance with the amendment made by MICITT to the 2015-2021 PNDT, and in furtherance of provision 4.5 set forth in report DFOEIFR-IF-0001-2020 of the Office of the Comptroller General of the Republic (CGR), the Board of Directors of SUTEL instructed the trustee of the trust, and its management units, to include mobile telephony services as part of these projects as of September 2020.

In terms of fixed services, in December 2024, there were 36,370 subscriptions to Internet and telephone services, representing a 15 % decrease between 2024 and 2023, mainly in fixed Internet service, where subscriptions fell by 4,685 (13 %), while fixed telephone subscriptions decreased by 1,954 (34 %) in the same period. However, fixed Internet service accounts for 90 % of total fixed service subscriptions (see Graph No. 255). Mobile service subscriptions, meanwhile, increased by 76 % from 2023 to 2024, reaching 171,620 services (see Graph No. 256). The upward trend in mobile services has remained constant over the last five years.

Subscriptions to basic fixed telephone and Internet services, generated by the implementation of the Connected Communities Program, have a penetration rate[58] of 0.2 % and 1.8 % respectively in 2024, representing a contribution to the country's total penetration of 0.6 % for fixed telephone services and 2.7 % for fixed Internet service. Meanwhile, subscriptions to mobile telephone service provided through infrastructure subsidized with FONATEL

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58   Services subscribed to per 100 housing units.

resources have a penetration rate[59] of 3.2 %, which is equivalent to a 2.4 % contribution to the country's total penetration (see Graph No. 257).

An analysis of the distribution of fixed Internet subscriptions under the Connected Communities Program by planning region shows that, in 2024, nearly half (45 %) of subscriptions to this service were registered in the Huetar Norte region, where five projects are being implemented. All regions experienced a decrease in the number of subscriptions to this service compared to 2023, ranging from 6 % to 21 %, with the Huetar Norte region itself showing the largest decline, corresponding to 1,833 fewer subscriptions (see Graph No. 258).

As for the fixed telephone service provided through this program, the subscriptions registered in 2024 are concentrated in the Chorotega region with 1,561 services (42 % of total subscriptions). Compared to 2023, all regions experienced a decrease in the number of subscriptions to this service, with the Huetar Caribe region standing out with a decrease of 1,096 (75 %) subscriptions (see Graph No. 259).

The marketing of mobile service subscriptions covered by projects financed by the Fund is carried out in the Huetar Norte, Huetar Caribe, and Brunca regions, with the Huetar Caribe region accounting for 59 % of total subscriptions. All regions experienced an increase in the number of subscriptions between 2023 and 2024, with the largest increase observed in the Huetar Caribe region with 53,603 additional subscriptions, representing a variation of 113 % (see Graph No. 260).

The provision of fixed and mobile services in the areas covered by the Connected Communities Program has benefited 268,412 people, who had subscribed to these services by the end of 2024, representing 5 % of the country's total population. By 2024, an increase of 27 % (57,674 people) is expected compared to 2023 (see Graph No. 261).

Financial indicators

The Connected Communities Program reported an investment of 6,039 million colones in 2024, a 108 % increase over 2023, representing an additional investment of 3,135 million colones. From the start of the program in 2013 until 2024, 46,529 million colones have been invested in the execution and maintenance of the program's projects, representing 17 % of the total cumulative investment executed by FONATEL (see Graph No. 262). The investment made in 2024 was distributed among three operators/service providers, namely: ICE, Claro, and Liberty, with the former executing 77 % of the resources paid in 2024.

Connected Households Program (PHC as per its acronym in Spanish)

Goal achievement indicators of the National Telecommunications Development Plan

This program has two projects in the "in-progress" phase. The first of these two projects was started on June 6th, 2016, in furtherance of the 2015-2021 PNDT's Goal No. 5. The goal was carried out to completion in the first half of 2023, providing 186,558 households with a subsidy based on the quintile of household income, for a period of 5 years, for the purpose of acquiring Internet services and a laptop computer. This subsidy is currently applied to the monthly bill of each beneficiary household, over a period of 5 years until 2028, in accordance with the date on which each household enters the program.

The second of these two projects, which was carried out in furtherance of the 2022-2027 PNDT's Goal No. 7, seeks to provide 100,684 socioeconomically

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59   Services per 100 inhabitants.

vulnerable households, with students enrolled in the Costa Rican public education system, with a subsidy based on the quintile of household income, over a period of 3 years, for the purpose of acquiring Internet services. This includes any subsidy provided for the purpose of acquiring a "MIFI" device, in the event that the service is provided through mobile technology. This project began on December 28, 2020, and by the end of September 2024, it was 100 % complete. This percentage of progress is 16 pp higher than that recorded in 2023 (see Graph No. 263).

Initially, the Internet service provided through both projects had a minimum speed of 5/1 Mbps; however, in 2024, it was increased to 15/1 Mbps (SUTEL Council Agreement 010-066-2024 of November 27, 2024).

Through the joint implementation of the PHC projects, in 2024, 287,242 subsidies were delivered, corresponding to 239,461 households in poverty, of which 186,558 (78 %) benefited from a five-year subsidy for a computer and Internet access under the first project, and 52,903 (22 %) households benefited from a three-year subsidy for Internet access under the second project. It should be noted that 47,781 households transferred from the first project to the second PHC project, benefiting from an Internet subsidy for 8 years or 96 months[60].

Compared to 2023, the number of subsidies granted in 2024 is 16,367 (6 %) higher, and the number of households benefiting is 7,374 (3 %) higher. This increase is a result of the second PHC project, as the first had already achieved 100 % of its public policy goal in 2023 (see Graph No. 264).

Of the total number of households benefiting from this program (239,461 households), 113,379 (47 %) have active Internet service and 126,082 (53 %) have inactive service. Compared to 2023, the number of active households decreased by 27 pp, while the number of inactive households or those outside the program increased by 66 pp (see Graph No. 265).

This result is consistent with the fulfillment of public policy goals and the consequent end of the 60- and 36-month subsidy period granted to households.

In the first PHC project, of the 186,558 beneficiary households, 77,950 (42 %) are active and 108,608 (58 %) are inactive. In the second project, there are 71,222 (71 %) active households and 29,462 (29 %) inactive households.

Management indicators

The distribution of households benefiting from the PHC (projects 1 and 2) according to income quintile, a variable used as a criterion for defining the program's target population, shows that 77 % (185,275) of beneficiary households are classified in the first income quintile, 18 % (42,852 households) in the second income quintile, and 5 % (11,334 households) in the third income quintile. From 2023 to 2024, the relative weight of beneficiary households in the first income quintile decreased by half a percentage point, while the second and third income quintiles increased by 0.3 and 0.2 pp, respectively (see Graph No. 266).

It should be noted that, even though these households are categorized by quintile of income, they are all considered to be living in poverty as they have been specifically selected by IMAS from its own database.

The Connected Households program involves the participation of 12 Internet service providers, namely: Telecable S. A. (Telecable), Liberty Communications of Costa Rica LLC (Liberty), Millicom Cable Costa Rica S. A. (Tigo), Instituto Costarricense de Electricidad (ICE), Claro CR Telecomunicaciones S.A. (Claro), Cooperativa de Electrificación Rural de San Carlos R.L. (Coopelesca), Cooperativa de Electrificación Rural de Los Santos R.L. (Coopesantos), Cooperativa de Electrificación Rural de Zarcero R.L. (Coopealfaroruiz), Cooperativa de Electrificación Rural de Guanacaste R. L. (Coopeguanacaste), Servicios Femarroca (Teki or Cable Pacayas) and

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60   Through official letter MICITT-DVT-OF-762-2021 dated December 14, 2021, MICITT ordered the following: *"(...) 2. That those households identified in the previous point that meet the conditions defined for goal 43, which is currently being implemented and will be followed up in the PNDT 2022-2027, and with the aim of meeting the connectivity needs of the education community, be progressively transferred as the contracts for goal 5 expire to goal 43 (...)"*

Cable Caribe S. A. (Cable Caribe) and Cinema Turrialba S. A. (Cable Net). Telecable, Liberty, Tigo, and ICE account for 91 % (218,209) of the households that have benefited. These four Internet providers have accounted for the largest number of households that have benefited since 2016 (see Graph No. 267).

In 2024, 13.1 % of households in the country benefited from the Connected Households program, 0.1 % more than in 2023. Puntarenas and Guanacaste are the provinces with the highest penetration of the program[61], with 20 % and 18 % of the total number of beneficiary households, respectively. Next are Cartago (14 %), San José and Alajuela (12 % each), Limón (11 %), and Heredia with 9 %. Compared to 2023, only Cartago saw a change in penetration, which increased by 1 pp (see Graph No. 268).

The increase in the number of beneficiary households allowed for the expansion of both program projects throughout the country, covering 488 (99 %) districts with at least one beneficiary household, which represented a positive variation of 1 % (three more districts) compared to 2023 (see Graph No. 269). Specifically, the first project (Goal No. 5 of the 2015-2021 PNDT) is being implemented in 484 districts (98 % of the total number of districts nationwide), while the second project (Goal No. 7 of the 2022-2027 PNDT) is being implemented in 485 districts (99 %) of the total number of districts nationwide (see Map No. 3).

Beneficiary indicators

In 2024, a total of 113,379 active subsidized subscriptions to fixed Internet access[62] services provided by the PHC (projects 1 and 2 combined) were reported, 42,811 fewer subscriptions than in 2023, representing a 27 % decrease. Likewise, the number of net active subsidized subscriptions for 2024 was estimated at 78,232, which is 29,540 (27 %) lower than the estimate for 2023.

Considering that the penetration rate per 100 housing units of fixed Internet access service in the market in general was 66.0 % in 2024[63], it can be concluded that the Connected Households Program contributed to the penetration of fixed Internet access service in the market by 9.5 % in 2024, representing a decrease of 4.1 % compared to 2023 (see Graph No. 270). Likewise, the penetration of the program's fixed Internet service fell from 8.8 % to 6.3 % during the 2023-2024 biennium.

The 239,461 households benefiting from the PHC in 2024 enabled 836,655 people to access the benefits of this program, representing an increase of 36,020 (4 %) between 2023 and 2024. Of the total number of beneficiaries, 628,272 (75 %) correspond to the first project (goal 5 of the PNDT 2015-2021) and 369,295 (19 %) to the second project (goal 7 of the PNDT 2022-2027) (see Graph No. 271).

Furthermore, an analysis of the composition of these beneficiary households reveals that 155,627 (65 %) are headed by women and that 419,016 (50 %) of the beneficiary population are minors, corresponding to a variation of 3 % and 8 %, respectively, between 2023 and 2024.

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61 Market penetration is calculated by dividing the total number of beneficiary households by the total number of households in each province.
62 This corresponds to households benefiting from active Internet access service.
63 Data extracted from the Data Transfer section of this report: "Statistics of the Telecommunications Sector", SUTEL, 2024.

Financial indicators

During 2024, 12,427 million colones from FONATEL were executed in the PHC, 6,492 million colones (34 %) less than the amount invested in 2023. The cumulative execution of FONATEL in the PHC during the 2016-2024 period reached 127,712 million colones, representing 47 % of the total amount cumulatively executed by FONATEL for the development of the programs (see Graph No. 272).

The reduction in investment under the Connected Households Program is justified by the departure of households as a result of the expiration of the 60- and 36-month subsidy period provided under projects 1 and 2 of this program.

The amounts executed in 2024 in the PHC were distributed among 12 Internet providers that are part of this program. The largest share of disbursements was allocated to Telecable, S.A. (29 %), Instituto Costarricense de Electricidad (27 %), Liberty Telecomunicaciones de Costa Rica LY, S.A. (19 %), and Millicom Cable Costa Rica, S.A. (13 %). These providers account for 88 % of the total FONATEL resources executed in this program.

The delay in meeting goal 7 of the 2022-2027 PNDT was due to the absence and outdated contact information of the households to be benefited, as well as problems with the quality of information on other variables in the database of potential program beneficiaries provided by IMAS.

Provisioned Public Centers Program (PCPE as per its acronym in Spanish)

Goal achievement indicators of the National Telecommunications Development Plan

The 2022-2027 PNDT includes four goals geared towards the provision of support devices and products[64] with FONATEL resources, with the purpose of serving the CENCINAI, the National Resource Center for Inclusive Education (CENAREC as per its acronym in Spanish), the National Council for Persons with Disabilities (CONAPDIS as per its acronym in Spanish), and the MICITT's Intelligence Community Centers (CECI as per its acronym in Spanish), namely:

- Goal No. 18: Provide 7113 Internet connectivity devices to CENCINAI by 2024

- Goal No. 19: Provide 7722 Internet connectivity devices to CONAPDIS by 2024

- Goal No. 20: Provide 476 Internet connectivity devices to CENAREC by 2024

- Goal No. 21: Provide 6738 Internet connectivity devices to CECI by 2024

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64 Support devices and products are defined as devices, equipment and/or instruments that support access to Information and Communication Technologies (ICT), including technologies, software and products designed to promote the personal autonomy of people with disabilities.

Only goal 18 has a FONATEL project under development to complete it. The remaining goals do not have a signed action plan due to a lack of information, which is relevant input for determining the scope, from CONAPDIS, CENAREC, and CECI/MICITT.

Goal 18 is 15 % complete with respect to the overall goal for 2024, corresponding to the implementation of the first project in this program. The fulfillment of goal 18 was moved to 2025 as a result of the delay in the publication of the PNDT 2022-2027 and in determining the scope of the need to be addressed through this goal. The corresponding adjustment request is currently being processed by MICITT.

Management indicators

Through the Provisioned Public Centers Program, two projects have been implemented, providing 123,643 devices and support products to 6,332 CPSPs in public institutions that serve persons with disabilities, located in 468 (95 %) of the country's districts (see Graph No. 273). The first of these two projects was carried out to completion from 2017 to 2018 in furtherance of the 2015-2021 PNDT's Goal No. 9. As a result, 36,831 devices and support products for Internet access and use were provided to 3,809 public institutions serving vulnerable populations (MEP, MICITT, CEN-CINAI, and Ministry of Health).

The second project was 100 % implemented between 2021 and April 2023 under an expansion of the scope of goal 9 of the 2015-2021 PNDT. As a result, 86,812 devices and assistive products were provided to 2,772 MEP education centers, with the purpose of assisting students in the Costa Rican education system who fall within income deciles 1 to 5 and are in a situation of socioeconomic vulnerability. Most of the support devices and products (92 %) were delivered to MEP education centers (see Graph No. 274).

The 6,332 CPSPs that benefited from receiving support devices and products are distributed among 468 (95 %) districts in the country, covering all seven provinces (see Map No. 4).

In addition, the project associated with the fulfillment of goal 18 of the PNDT 2022-2027 is currently in the bidding phase. Below is a summary of the milestones associated with the progress of this project:

- Under official letter 06043-SUTEL-DGF-2023 dated July 19, 2023, the Development Order for the third project of the Provisioned Public Centers Program was sent to the trustee of the FONATEL trust, in order to comply with goal 18 of the PNDT 2022-2027.

- On June 6, 2024, the tender notice was published. Six objections were received by the Office of the Comptroller General of the Republic from Componentes El Orbe S.A., GBM de Costa Rica S.A., RICOH Costa Rica S.A., Telecomunicaciones Radiodigitales S.A., Central de Servicios PC S.A., and Radiográfica Costarricense S.A.

- On September 3, 2024, the bids were opened. Three bids were received: Consorcio GBM, TELERAD and RACSA, Consorcio TEKI and Corporación ACS, and PC Central.

- Under official letter 0781-SUTEL-CS-2024 dated December 4, 2024, SUTEL and the National Directorate of CEN-CINAI submitted to MICITT a request to adjust the adjusted goal 18, in accordance with the observations presented by MICITT.

- On December 24, 2024, the contract was awarded to the company Central de Servicios PC S.A.; however, thereafter an appeal was filed by the TEKI-ACS Consortium, which is currently being reviewed for admissibility by the CGR.

Financial indicators

The implementation of the two projects mentioned above has meant a cumulative investment of 46,897 million colones (2017-2024), representing 17 % of the total cumulative investment made by FONATEL for the development of the programs. No investment is recorded for 2024, as the fulfillment of goal 18 of the PNDT 2022-2027 was rolled forward to 2025 (see Graph No. 275).

Connected Public Spaces Program (PEPC)

Management indicators

There is one project in the "in-progress" phase under the Connected Public Spaces Program (PEPC as per its acronym in Spanish). This project intends to make 513 free Internet access zones operational. This scope, as defined in goal 13 of the 2015-2021 PNDT, was 100 % achieved on January 4, 2021, with a total of 419 (82 %) ZAIGs in public spaces, 61 (12 %) in SINABI public libraries, 28 (5 %) in INCOFER train stations, and 7 (1 %) in Civic Centers for Peace. It should be noted that two of these zones are classified as both a library and a civic center. As such, in the breakdown per type of zone, these are counted twice and should total 515, instead of the 513 free Internet access zones specified in the goal.

Even though the public policy goal was carried out to completion, the SUTEL continues to provide operational and financial assistance to each free Internet access zone, in keeping with the subsidy term of each zone. The subsidies are provided for a term of 3, 5, or 7 years, depending on the type of zone. As of December 2024, there are 308 ZAIGs with active subsidies, corresponding to 80 % of the total number of provisioned zones. This represents a 25 % (103) decrease in zones with active subsidies between 2023 and 2024.

It is important to note that of the 205 ZAIGs with subsidies that ended in 2024, more than half (58 %) maintain active service, which means that 119 areas have maintained the service paid for with their own resources. This implies an increase of 83 % (54) compared to 2023 in the number of digital zones that maintain the service in operation despite not having subsidies (see Graph No. 276).

Of the total number of digital zones that maintain active subsidies at the end of 2024, 286 (93 %) correspond to public access spaces (parks, sports grounds, community halls, among others). Compared to 2023, public libraries are the digital zones that experienced the greatest decline during 2024, with 46 zones (75 %) fewer than in 2023. The other types of zones experienced declines of between 4 and 31 zones between 2023 and 2024 (see Graph No. 277). As for the zones that ended the subsidy period but maintain active service, the majority (64 %) correspond to public access spaces, and 1 in 4 are public libraries.

When reviewing the distribution of ZAIGs that will maintain active subsidies in 2024 by province, it is noted that proportionality has been maintained despite the fact that 40 % of the zones have reached the end of the subsidy period. The provinces of the GMA have the highest number of areas with active subsidies in 2024, accounting for 69 % of the total (see Graph No. 278). Compared to 2023, all provinces experienced a decrease in the number of active zones, with the provinces with the largest decrease in active zones being San José (36 fewer zones, for a 38 % variation), as well as Alajuela and Heredia with 21 fewer zones each, representing a negative variation of 19 % and 55 %, respectively.

The 308 digital zones with active subsidies are distributed among 221 districts in the country, covering 45 % of all districts nationwide. This number of districts represents a decrease of 16 % (43) compared to 2023, due to digital zones that reached the end of their subsidy period (see Graph No. 279). However, it is important to note that in 2021, upon achieving 100 % of the goal of enabling 513 areas with free Internet access, coverage of 64 % of the country's districts had been attained, for a total of 315 districts with the program's presence.

Beneficiary indicators

During 2024, there were more than 1.6 million cumulative users (devices connected to the "*Zii para todos*" network) across the 427 digital zones with active service[65], with cumulative data traffic of 607,937 gigabytes (GB) (see Graph No. 280). These figures represent a 7 % increase in the total number of users and a 14 % decrease in traffic between 2023 and 2024. Considering only users who connected to the network once, the number of users connected in 2024 corresponds to 620,482, representing an 11 % increase compared to 2023.

Additionally, during 2024, there were 5.0 million sessions initiated with an average duration of 33 minutes per session and 3.0 sessions initiated per user, for a cumulative total of 2.7 million hours of use (see Graph No. 281). These figures represent a 19 % decrease in connection hours and a 10 % decrease in sessions initiated compared to 2023, due to the 86 ZAIGs that have permanently ceased operations, i.e., that do not have active service.

> **Since the beginning of its operation, the program has cumulatively benefited more than 2.9 million unique users, representing 56 % of the country's total population, for an average of 496,259 new users per year**

From 2019 to 2024, the total number of users has accumulated more than 29.8 million sessions initiated with more than 16.8 million hours of use and has generated more than 3.6 million GB of data traffic.

Financial indicators

During 2024, 4,676 million colones from FONATEL were executed in this program, 1,281 million colones (22 %) less than in 2023. The reduction in the investment executed is due to the ZAIGs, which in 2024 reached the end of the subsidy period granted and, therefore, are no longer paid for with Fund resources.

During the total implementation period of the Connected Public Spaces Program (2019-2024), 29,612 million colones have been invested, which corresponds to 11 % of FONATEL's total accumulated investment for program implementation (see Graph No. 282). The investment executed during 2024 was distributed among the three operators participating in the program, namely: the ICE-RACSA-PC Central consortium, Coopeguanacaste, and Telecable; where Coopeguanacaste executed the majority of these resources, 1,777 million colones, or 38 %.

Education Network Program (PRE)

Goal achievement indicators of the National Telecommunications Development Plan

This program arose within the framework of goal 14 of the 2015-2021 PNDT, to provide connectivity at speeds of 15 to 500 Mbps to education centers located in rural and hard-to-reach areas of the country. To complete the FONATEL axis of the Education Network (RE), the MICITT incorporated goal 5 into the PNDT 2022-2027, namely: "100 % progress in the implementation of the FONATEL axis of the Education Network."

The action plan for goal 5 of the PNDT 2022-2027 was signed by SUTEL and MEP on July 31, 2024 (SUTEL Council Agreement 011-032-2024 of July 31, 2024), approximately 20 months after the PNDT 2022-2027 was published. The delay in finalizing and signing this

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65   This refers to the 308 areas with active subsidies plus the 119 areas that, despite not having active subsidies, do have the service.

planning instrument was due to problems experienced by the MEP in determining which education centers would benefit.

According to the action plan for goal 5, 2,138 education centers nationwide located in rural and hard-to-reach areas will be provided with connectivity at speeds of 15 to 500 Mbps. Specifically, FONATEL resources will subsidize the installation of the telecommunications infrastructure necessary to implement layers 1 (connectivity services), 2 (passive infrastructure), and 3a (access switch equipment, wireless access points), as well as the Internet service bill for a five-year period.

Due to the delay in the construction of the action plan for goal 5, it was necessary to adjust the progress per period and the indicator for this goal. Full compliance (100 %) with the target was moved from 2027 to 2028, and in calculating the progress indicator, in addition to the implementation phase, which corresponds to the connectivity of education centers, the pre-implementation phase was also taken into account, which includes the development and signing of the action plan, the signing of the SUTEL-MEP agreement, and the formulation and contracting process for the implementation of the network. Based on these changes, the baseline for the goal increased from 26.5 % to 28.2 %, and with the signing of the action plan, progress toward meeting the target for 2024 stood at 38.2 %, equivalent to the sum of the baseline plus 10 % corresponding to the signing of the action plan. The new progress reported in 2024 represents an increase of 11.8 % over what was reported in 2023[66] (see Graph No. 283).

Management indicators

Although no education centers were added to the Educational Network in 2024, due to delays in the implementation of action plan for goal 5, upon signing this instrument, SUTEL began drafting the terms of reference for the tender for projects to provide high-speed Internet service and deploy an internal

wireless network in 1,446 MEP education centers. A preliminary hearing was held on December 5, 2024. The publication of the tender specifications (opening of the tender) is scheduled for March 2025.

Below is a summary of the results of the Education Network Program accumulated as of 2024, most of which, due to delays in the development of the action plan, show no change from 2023:

- At the end of 2023, 748 education centers were visited to analyze the solution to be implemented. Of these, 747 had their technical requirements for implementation assessed, 693 had the solution design delivered to the authorities, and 685 had the solution design approved. However, these figures show a slight decrease compared to 2024 because, with the new action plan for goal 5, the list of education centers to be connected was modified, excluding some centers that had been previously addressed but had problems that prevented the installation of the internal network. In all cases, the number of education centers that completed these phases was reduced to 682, which corresponds to the centers that were incorporated into the education network (with connectivity and an internal network). For this reason, in 2024 there were negative variations of between 3 and 66 education centers intervened compared to 2023. The 682 education centers connected to the RE correspond to 32 % of the total number of centers to be connected (see Graph No. 284).

- Of the 682 education centers that have benefited, more than half (52 %) have a 100 Mbps Internet connection, 87 % have connections equal to or greater than 100 Mbps, and only 13 % have connections less than 100 Mbps (see Graph No. 285). It is important to note that connection speeds are set according to the number of students enrolled, which means that nearly 9 out of 10 education centers have a high number of students.

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66 The progress reported in 2023 was obtained by applying the calculation formula included in the 2015-2021 PNDT, since the action plan for the 2022-2027 PNDT had not been signed.

- When analyzing the distribution of the 682 education centers incorporated into the RE by operator, it is found that the Cooperativa de Electrificación Rural de Guanacaste, R. L. (Coopeguanacaste) serves the largest number with 253, followed by the RACSA-ICE-PC Central consortium with 30 %, Telecable S.A. with 27 %, and Liberty Telecomunicaciones de Costa Rica LY S.A., which provides service to 39 education centers (see Graph No. 286).

- To cover the 682 education centers, 4,606 access points (AP) were installed, for an average of 7 APs per education center. The education centers connected to the RE are distributed among 176 districts (36 %) of the country, most of which (67 %) belong to the Huetar Norte, Huetar Caribe, and Brunca regions (see Map No. 5).

- The distribution of education centers by province shows that the largest number are located in Limón and Alajuela, with 157 and 156 centers, respectively, representing 46 % of the total; followed by Puntarenas and Guanacaste, which account for 31 %, San José with 96 centers, Heredia with 37, and Cartago with 25 (see Graph No. 287).

Beneficiary indicators

The connectivity of 682 education centers has benefited 162,210 students, 646 (0.4 %) more than in 2023 (see Graph No. 288). Despite maintaining the same number of education centers connected to the RE, the number of students benefiting varies as a result of changes in enrollment at these centers.

At the end of 2024, a cumulative total of 2.7 million users[67] (students, teachers, and administrators) of the network installed in education centers were reported, representing a 42 % increase over the number of users registered in 2023. These users consumed a total of 1.9 million terabytes (TB) of data during 2024, 62 % more than in 2023 (see Graph No. 289). By 2024, an average of 2,662 users were registered per education center, and each user consumed 737 gigabytes (GB) of data.

Considering only users who connected to the network once, the number of users connected in 2024 was 558,370, representing a 38 % increase over 2023. On average, there were 311,031 new users per year.

Additionally, during 2024, there were 18.4 million sessions initiated with an average duration of 41 minutes per session and 6.8 sessions initiated per

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67   Devices that connected to the internal network installed in education centers connected to the RE.

user, which implies an average of 4.6 hours of use per user, for a total of 12.4 million hours of use (see Graph No. 290). These figures represent a 29 % increase in connection hours and a 41 % increase in sessions initiated compared to 2023.

Cumulatively, in the four years of operation of the Connected Public Spaces Program (2021 to 2024), more than 3.5 million unique users (students, teachers, and administrators) have benefited from the network installed in education centers, representing 67 % of the country's total population,

for a cumulative total of 5.6 million users by 2024. These users have initiated a cumulative total of 37.4 million sessions between 2021 and 2024, for a total of 27.5 million hours of use and 3.6 million terabytes (TB) of data traffic.

Financial indicators

A total of 20 526 million colones from FONATEL were invested in order to develop this program from 2021 to 2024. The investment made in 2024 was 7,437 million colones, which represents a variation of 0.3 % (20 million colones more) compared to 2023 (see Graph No. 291).

The operator with the largest cumulative allocation of resources under this program is the Cooperativa de Electrificación Rural de Guanacaste R. L. (Coopeguanacaste) with 8,078 million colones, corresponding to 39 % of the total, followed by Telecable S. A. with 5,474 million colones (27 %), the ICE-RACSA-PC Central consortium with 5,449 million (27 %), and Liberty Telecomunicaciones de Costa Rica LY S.A. with 1,525 million colones (7 %). The first two experienced a reduction in the amounts allocated of 7 percentage points between 2023 and 2024, while ICE-RACSA-PC Central and Liberty Telecomunicaciones de Costa Rica LY, S.A. experienced an increase of 10 and 372 percentage points, respectively.

TABLE 22. COSTA RICA: Achievement of goals established in the 2022-2027 PNDT under FONATEL programs in 2022-2027

(figures in percentage terms)

Description of Goal	Year	Current goal[1]	Progress in 2024[2]	Achievement % of annual goal	Achievement % of total goal
Goal No. 3: To provide 24 indigenous territories with fixed and mobile telecommunications' services coverage by 2026.	2022	9	9	100 %	38 %
	2023	15	14	93 %	58 %
	2024	17	17	100 %	71 %
	2025	22	NA	NA	NA
	2026	24	NA	NA	NA
Goal No. 4: To provide 262 districts with fixed and mobile telecommunications' services coverage, as the speeds defined in the PNDT, by 2027.	2022	MSP[3]	128	NA	49 %
	2023	MSP[3]	128	NA	49 %
	2024	138	130	94 %	50 %
	2025	188	NA	NA	NA
	2026	238	NA	NA	NA
	2027	262	NA	NA	NA
Goal No. 5: To achieve 100 % of FONATEL's Education Network Program by 2027.	2022	MSP[3]	25.8 %	NA	26 %
	2023	MSP[3]	26.5 %	NA	27 %
	2024	MSP[3]	38.2 %	NA	38 %
	2025	MSP[3]	NA	NA	NA
	2026	MSP[3]	NA	NA	NA
	2027	100 %	NA	NA	NA
Goal No. 6: To provide 331 CPSPs with a three-year Internet service subsidy by 2027. Note: CECI, CEN CINAI	2022	MSP[3]	124	NA	37 %
	2023	134	133	99 %	40 %
	2024	174	136	78 %	41 %
	2025	224	NA	NA	NA
	2026	274	NA	NA	NA
	2027	331	NA	NA	NA
Goal No. 7: To subsidize the Internet service of 100,684 socioeconomically vulnerable households with at least one student duly enrolled in the Costa Rican public education system by 2023.	2022	40 684	40 150	99 %	40 %
	2023	100,684	84,317	84 %	84 %
	2024	NA	100,684	NA	100 %

Description of Goal	Year	Current goal[1]	Progress in 2024[2]	Achievement % of annual goal	Achievement % of total goal
Goal No. 18: Provide 7113 Internet connectivity devices to CENCINAI by 2024	2022	MSP[3]	1,067	NA	15 %
	2023	MSP[3]	1,067	NA	15 %
	2024	7,113	1,067	NA	15 %
Goal No. 19: Provide 7722 Internet connectivity devices to CONAPDIS by 2024	2022	MSP[3]	0	NA	NA
	2023	MSP[3]	0	NA	NA
	2024	7,722	NA	NA	NA
Goal No. 20: Provide 476 Internet connectivity devices to CENAREC by 2024	2022	MSP[3]	0	NA	NA
	2023	MSP[3]	0	NA	NA
	2024	476	0	0 %	0 %
Goal No. 21: Provide 6738 Internet connectivity devices to CECI by 2024	2022	MSP[3]	5,058	NA	75 %
	2023	MSP[3]	5,058	NA	75 %
	2024	6,738	5,058	75 %	75 %

1 Goals established in the goal matrix of the 2022-2027 PNDT published in December 2022.
2 Progress data according to reports submitted by the Trustee of the FONATEL Trust.
3 MPS: Unscheduled goal.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 234. COSTA RICA: Total number of projects developed per year by FONATEL according to the project life cycle phase, 2020-2024
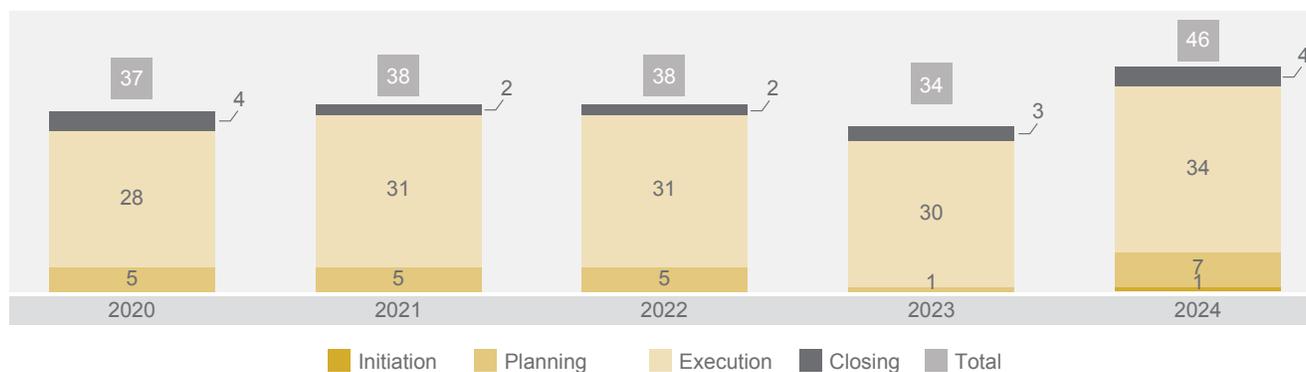
Note: In 2023, four projects to serve the Central Region were excluded because connectivity for those districts will be provided through the Radio Spectrum Tender for 5G.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 235. COSTA RICA: Number of districts with at least one program in development with FONATEL resources, 2020-2024

(figures in quantity and percentage terms)

481
99 %
2020

484
99 %
2021

487
99 %
2022

491
100 %
2023

491
100 %
2024
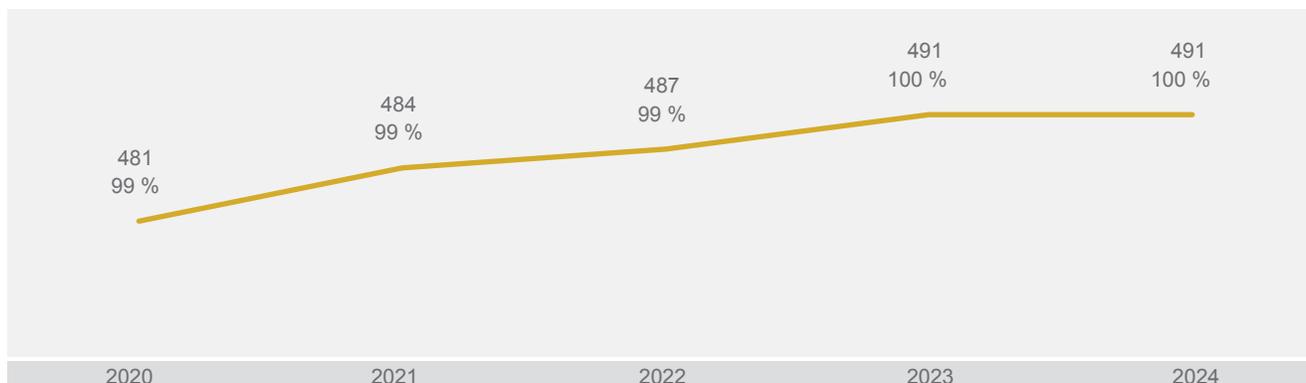
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 236. COSTA RICA: Number of devices granted through programs developed with FONATEL resources to provide access to ICTs, per program 2020-2024

(yearly aggregate figures)

Year	185,257	218,475	301,719	310,201	310,201
Equipped Public Centers	36,831	36,831	115,317	123,643	123,643
Connected Homes	148,426	181,644	186,402	186,558	186,558
	2020	2021	2022	2023	2024

■ P. Connected Homes   ■ P. Equipped Public Centers   ■ Total
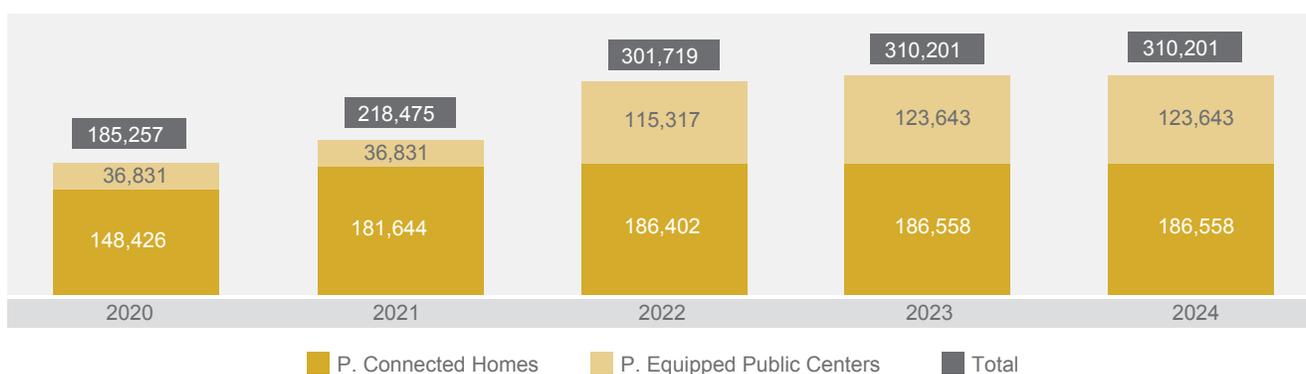
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 237. COSTA RICA: Number of Centers for the Provision of Public Services that have received benefits through FONATEL programs, per program, 2020-2024

(yearly aggregate figures)

Year	5,256	5,669	8,530	8,930	8,989
Bicentennial Educational Network		83	600	682	682
Equipped Public Centers	3,809	3,809	6,102	6,332	6,332
Connected Communities	1,447	1,777	1,828	1,916	1,975
	2020	2021	2022	2023	2024

■ P. Connected Communities   ■ P. Equipped Public Centers   ■ P. Bicentennial Educational Network   ■ Total
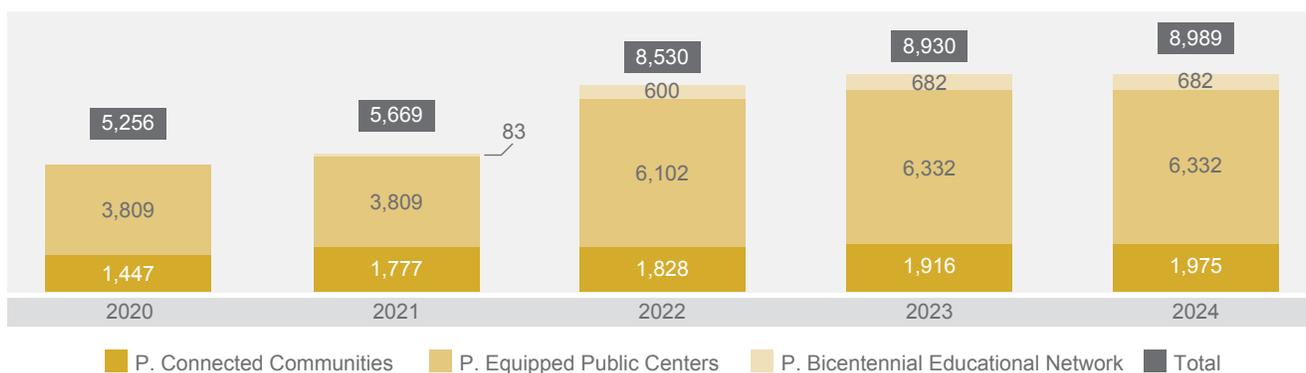
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 238. COSTA RICA: Number of inhabitants and households with access to voice and data services in districts in which programs are in development with FONATEL resources, 2020-2024

(figures in thousands)

	2020	2021	2022	2023	2024
Homes	420	468	508	516	533
Population	1,369	1,695	1,782	1,758	1,791

■ Homes   ■ Population
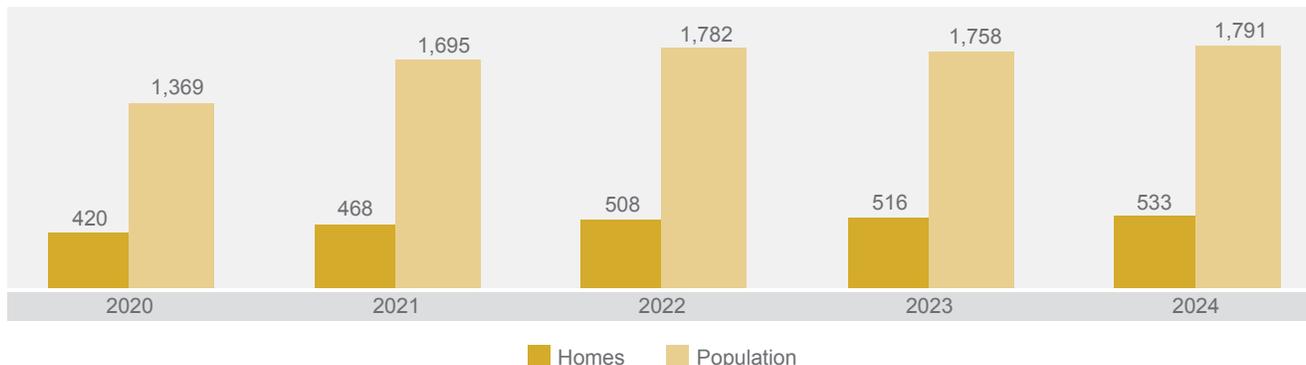
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 239. COSTA RICA: Number of fixed telephony and fixed Internet subscriptions provided through programs in development with FONATEL resources, 2020-2024

	2020	2021	2022	2023	2024
Fixed Telephony	3,351	5,000	5,102	5,679	3,725
Fixed Internet	175,402	226,867	246,899	269,417	272,106

■ Fixed Telephony   ■ Fixed Internet
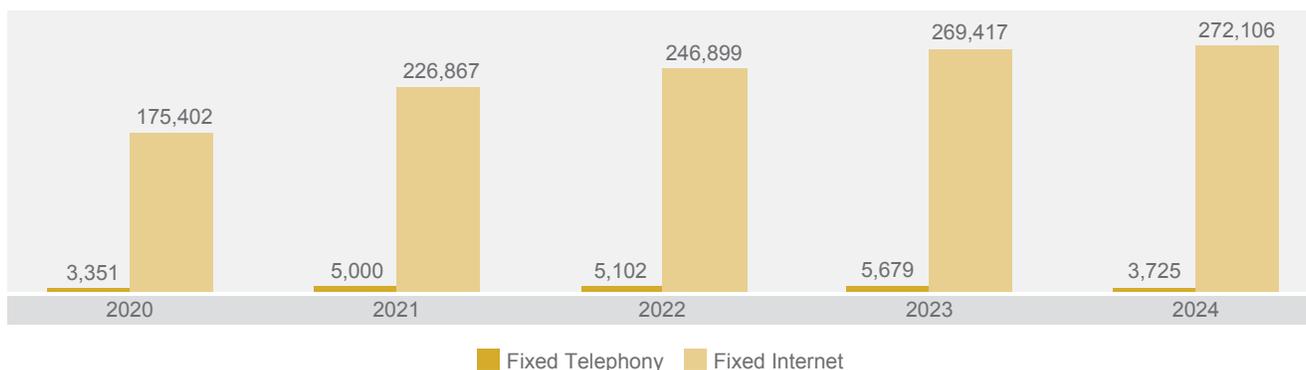
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 240. COSTA RICA: Amount of the population that has benefited from FONATEL programs, 2020-2024

2020	2021	2022	2023	2024
628,571	977,165	1,238,739	1,304,195	1,356,902
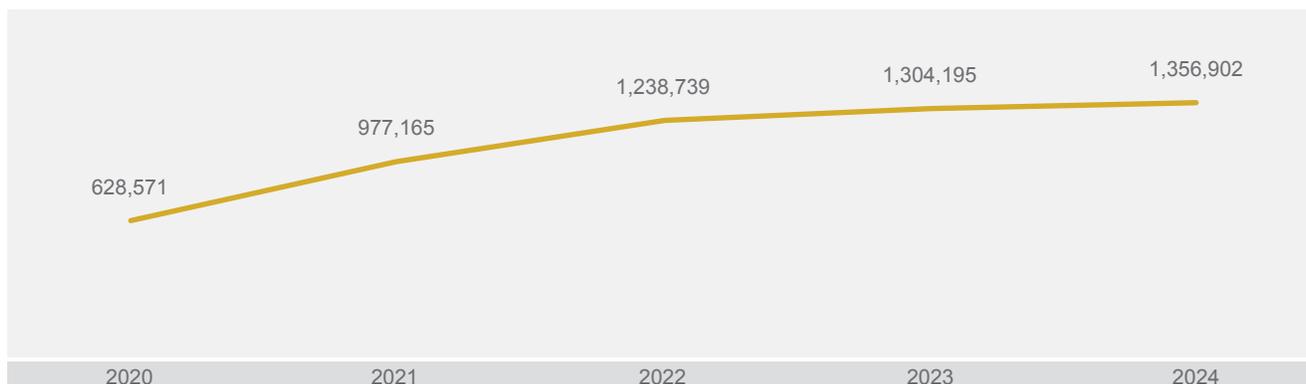
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 241. COSTA RICA: Equity of FONATEL, 2020-2024

(yearly figures in millions of colones)

211,188
204,683
157,171
104,921
92,680

2020   2021   2022   2023   2024
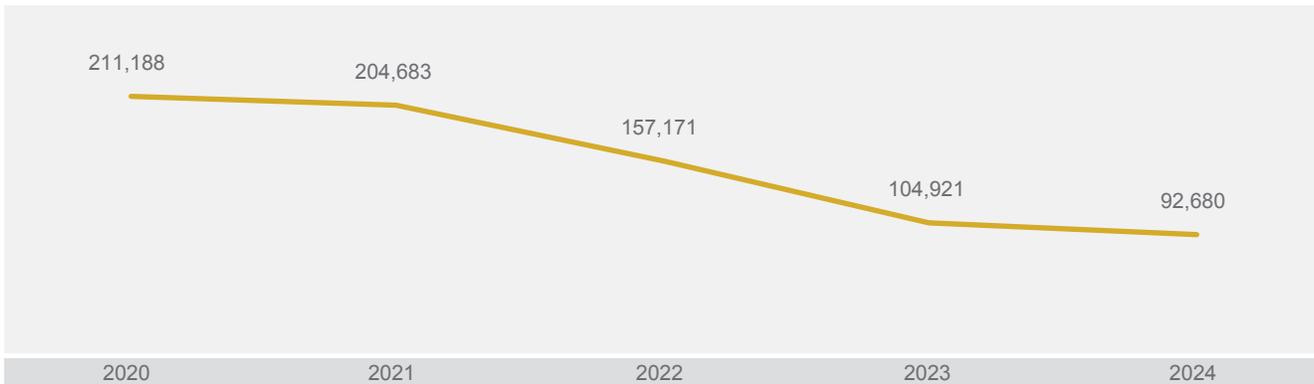
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 242. COSTA RICA: Special parafiscal contributions (CEPF as per its acronym in Spanish) collected, 2020-2024

(yearly figures in millions of colones)

14,297
13,890
10,399
14,285
14,119

2020   2021   2022   2023   2024
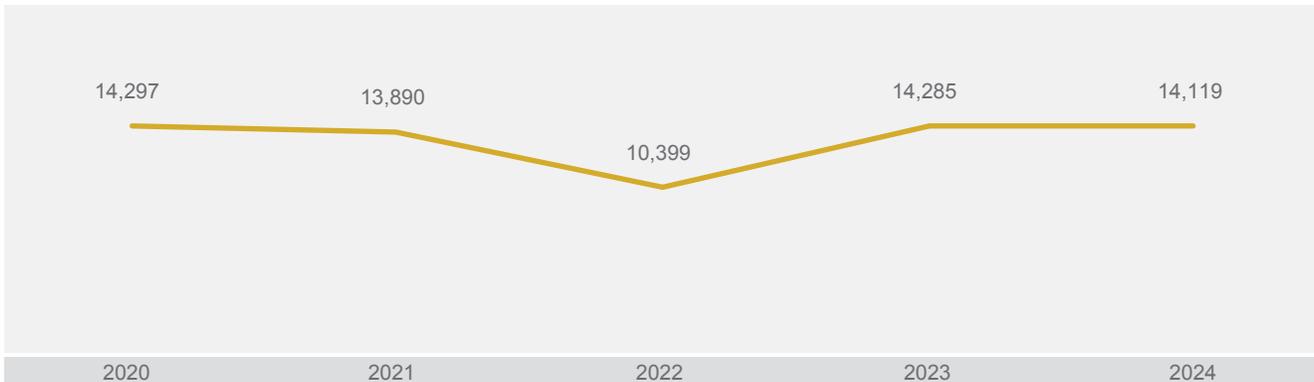
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 243. COSTA RICA: Annual and cumulative investment by FONATEL, 2020-2024

(yearly figures in millions of colones)

271,277
240,697
191,644
135,869
102,690
31,960   33,179   55,774   49,054   30,579

2020   2021   2022   2023   2024

— Annual investment   — Accumulated investment
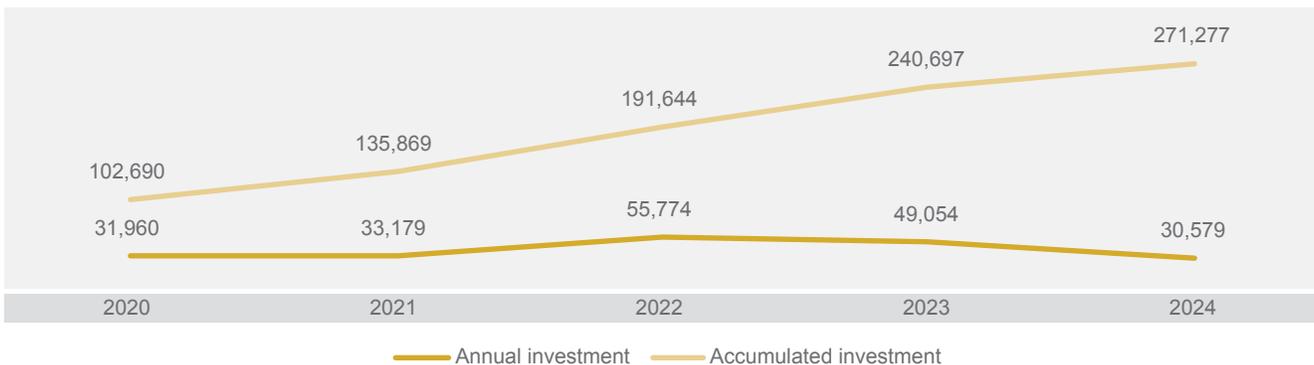
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 244. COSTA RICA: Investment by FONATEL per program, 2020-2024

(yearly figures in millions of colones)

	2020	2021	2022	2023	2024
Total	31,960	33,179	55,774	49,054	30,579
Bicentennial Educational Network			4,659	7,417	7,437
Connected Public Spaces	3,740	6,550	7,708	5,957	4,676
Connected Homes	17,366	21,006	23,467	13,857	12,427
Connected Communities	10,855	4,610	7,243	18,919	6,039
		1,013		2,904	

Legend: Connected Communities, Connected Homes, Connected Public Centers, Connected Public Spaces, Bicentennial Educational Network, Total investment
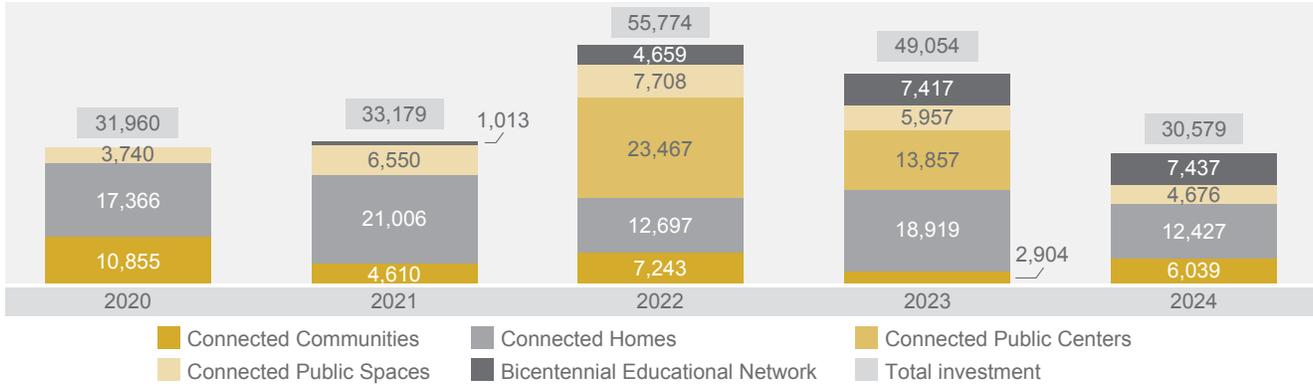
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 245. COSTA RICA: Percentage of investment made by FONATEL per operator, 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Total	31,960	33,179	55,774	49,054	30,579
Otros	4 %	5 %	2 %	4 %	5 %
Claro	8 %	6 %	3 %	7 %	5 %
Tigo	10 %	11 %	7 %	7 %	9 %
Liberty	13 %	20 %	9 %	11 %	16 %
Coopeguanacaste	4 %	7 %	14 %	4 %	4 %
Telecable	19 %	28 %		19 %	22 %
ICE /RACSA	43 %	23 %	62 %	48 %	40 %

Legend: ICE /RACSA, Telecable, Coopeguanacaste, Liberty, Tigo, Claro, Otros, Total investment
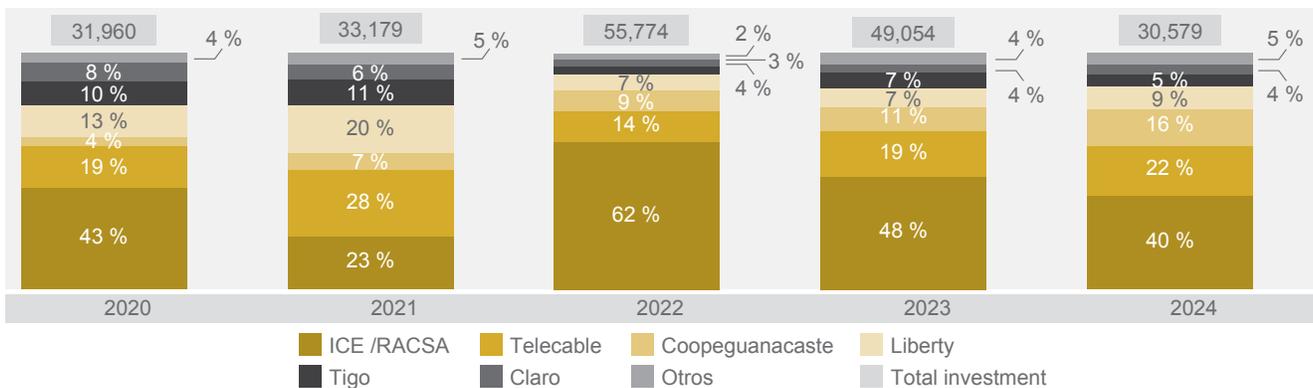
Note: Total investment represents the annual total in millions of colones.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 246. COSTA RICA: Achievement of the PNDT's Goal No. 3: to provide indigenous territories with access to voice and data services through the Connected Communities Program, 2022-2024

	2022	2023	2024
Annual target achievement	100 %	93 %	100 %
Total goal achievement	38 %	58 %	71 %
Territories with access	9	14	17

Legend: Territories with access, Total goal achievement, Annual target achievement
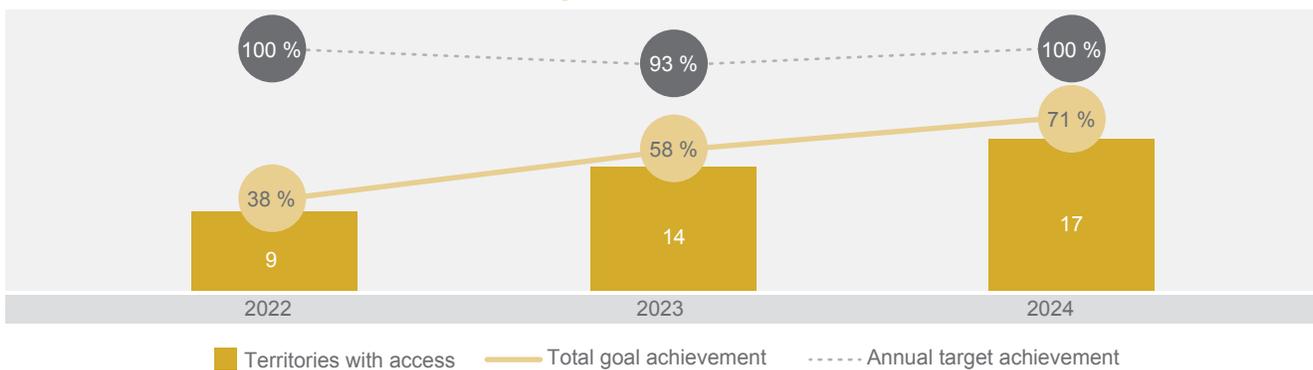
Note: Starting in 2023, the Quitirrisí indigenous territory will be included in the commercial offering.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 247. COSTA RICA: Achievement of the PNDT's Goal No. 4: to provide districts with access to voice and data services through the Connected Communities Program, 2022-2024

94 %

49 %   49 %   50 %

128   128   130

2022   2023   2024

■ Districts with access ─── Total goal achievement ● Annual target achievement
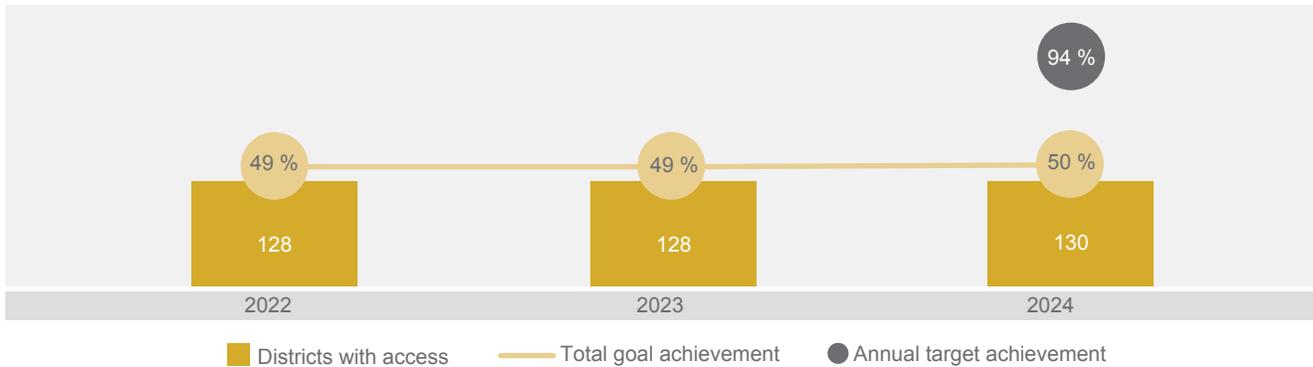
Note: The 2022-2027 PNDT does not set a goal for 2022 and 2023.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

MAP NO. 1. COSTA RICA: Districts with (total or partial) connectivity to voice and data services provided by the Connected Communities Program, 2024

With connectivity: ● No ● Yes
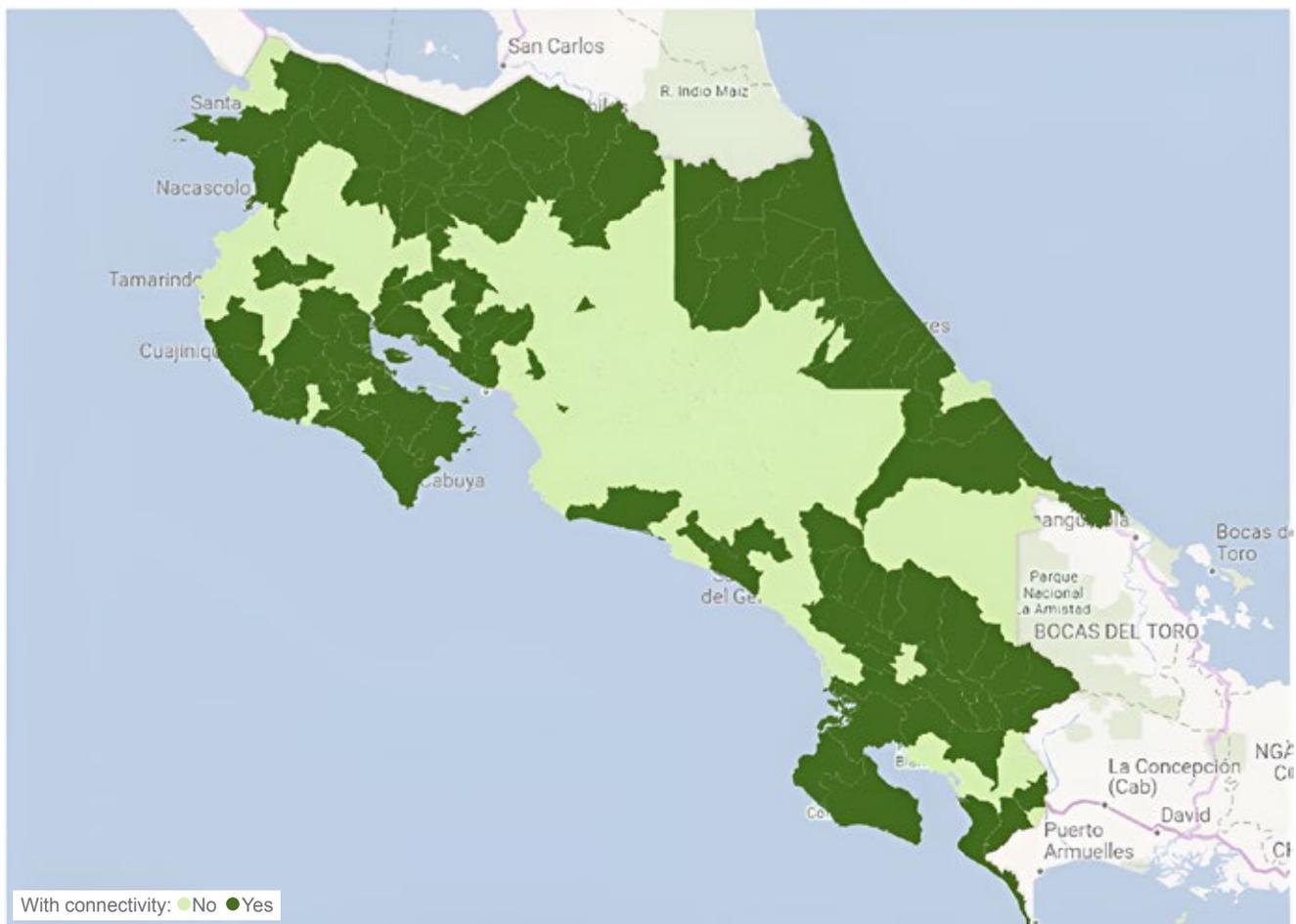
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

MAP NO. 2. COSTA RICA: Indigenous territories with (total or partial) connectivity to voice and data services provided by the Connected Communities Program, 2024
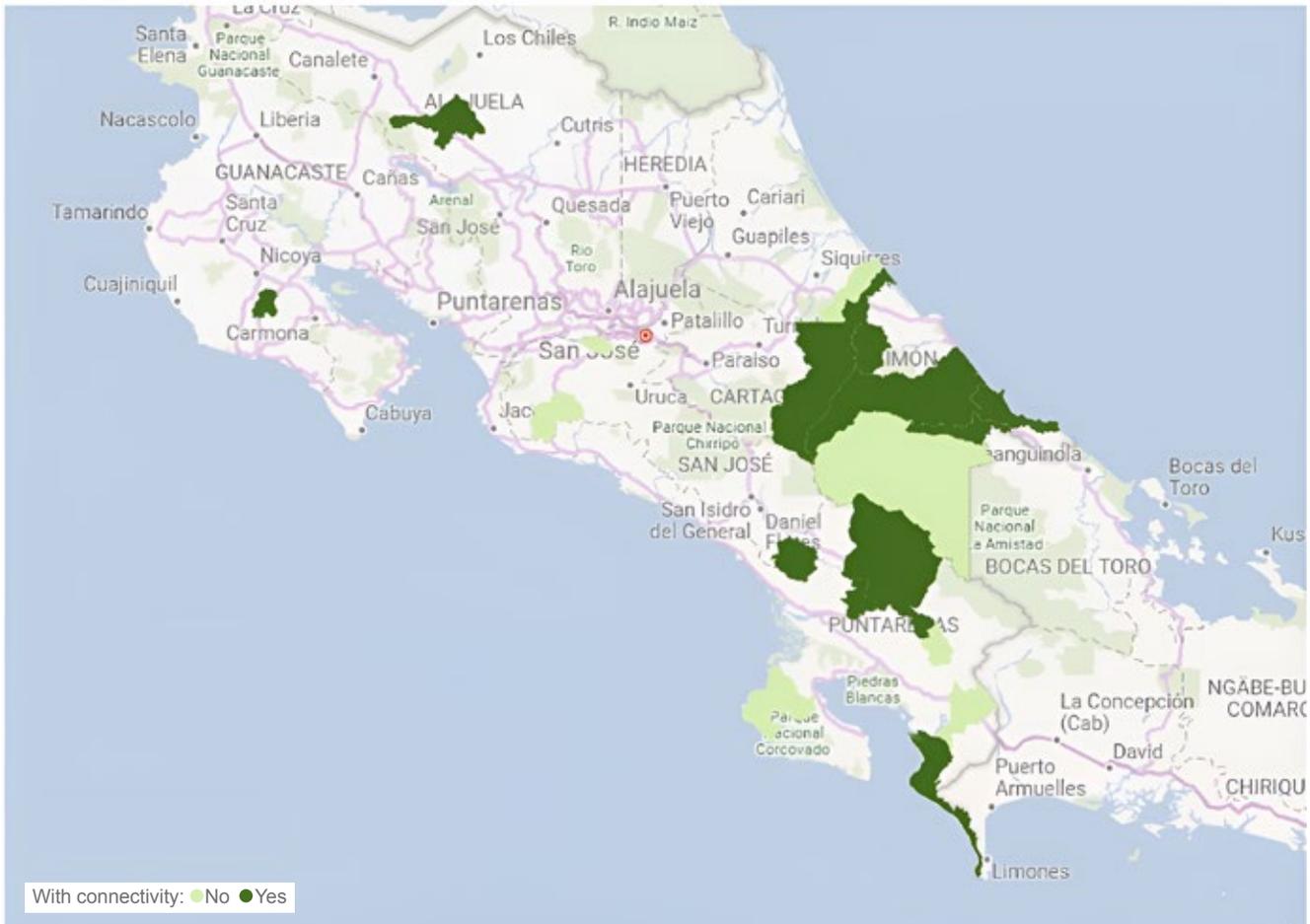
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 248. COSTA RICA: Districts and indigenous territories covered by the Connected Communities Program, 2020−2024
(figures in quantity and percentage terms)
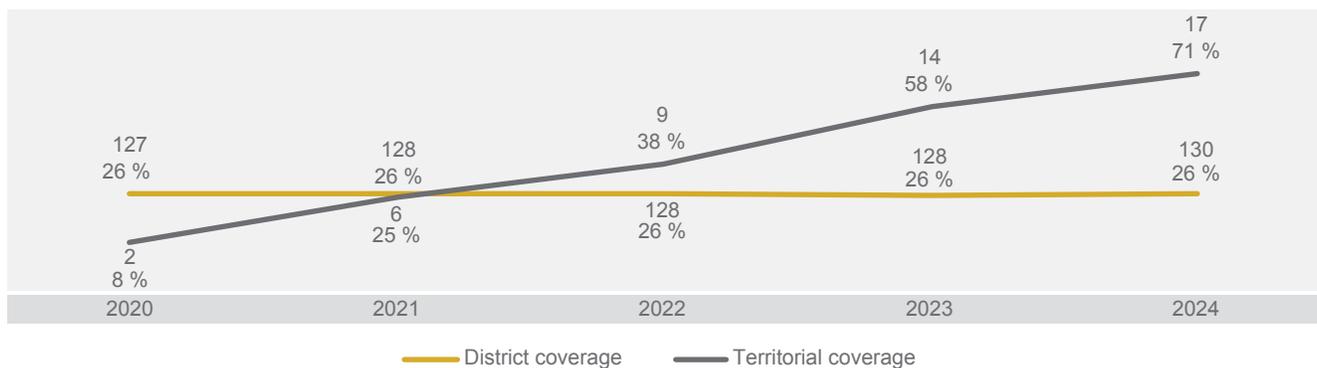
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 249. COSTA RICA: Total number of projects developed per year through the Connected Communities Program, according to the project life cycle phase, 2020-2024

Year	Initiation	Planning	Execution	Closing	Total
2020	4	24		4	32
2021	4	26		2	32
2022	4	26		2	32
2023		26		2	28
2024	6	29		3 (1)	39

Legend: ■ Initiation ■ Planning ■ Execution ■ Closing ■ Total

Note: In 2023, four projects to serve the Central Region were excluded because connectivity for those districts will be provided through the Radio Spectrum Tender for 5G.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 250. COSTA RICA: Distribution of sites with telecommunications infrastructure in operation under the Connected Communities Program by region, 2020-2024
(yearly aggregate figures)

Year	Huetar Caribe	Huetar Norte	Brunca	Chorotega	Pacifico	Total
2020	116	173	116	114	69	588
2021	127	175	118	129	77	626
2022	134	175	128	131	81	649
2023	143	175	142	137	85	682
2024	154	175	146	138	102	715

Legend: ■ Huetar Caribe ■ Huetar Norte ■ Brunca ■ Chorotega ■ Pacifico ■ Total

Note: The data for 2021, 2022, and 2023 were adjusted because two towers were found to have been recorded twice, and fiber optic nodes were added to the accounting.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 251. COSTA RICA: Number of towers in indigenous territories equipped with telecommunications infrastructure through the Connected Communities Program, 2020-2024

(yearly aggregate figures)

2020	2021	2022	2023	2024
6	18	29	50	65
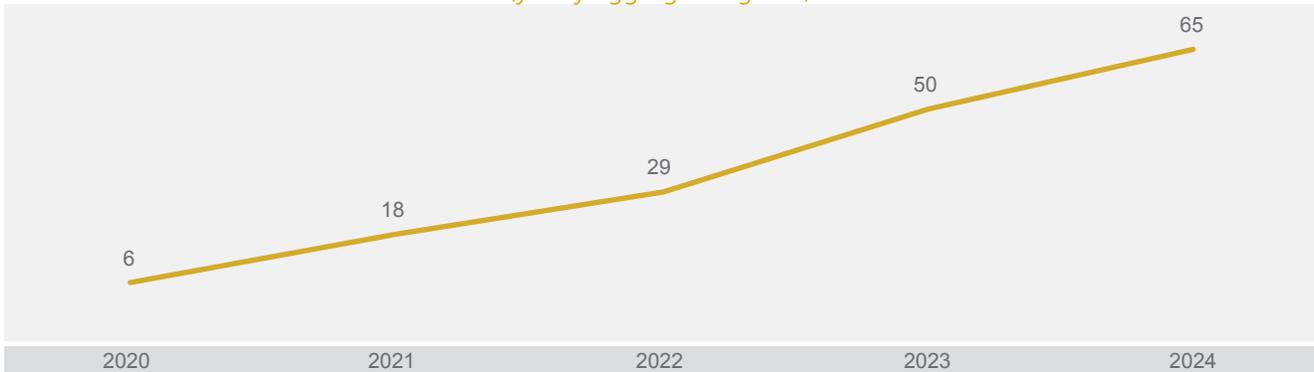
Note: The 2021 figure was adjusted because a coverage analysis determined that one of the towers put into operation in 2021 does not provide coverage to indigenous territories.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 252. COSTA RICA: Number of Centers for the Provision of Public Services that were provided Internet access through the Connected Communities Program, per institution, 2020-2024

(yearly aggregate figures)

	2020	2021	2022	2023	2024
Total	1,447	1,777	1,828	1,916	1,975
MEP	1,352	1,640	1,683	1,744	1,794
CEN-CINAI	66	97	98	103	104
MICITT	15	23	26	30	32
CCSS	14	17	21	39	45

■ MEP ■ CEN-CINAI ■ MICITT ■ CCSS ■ Total
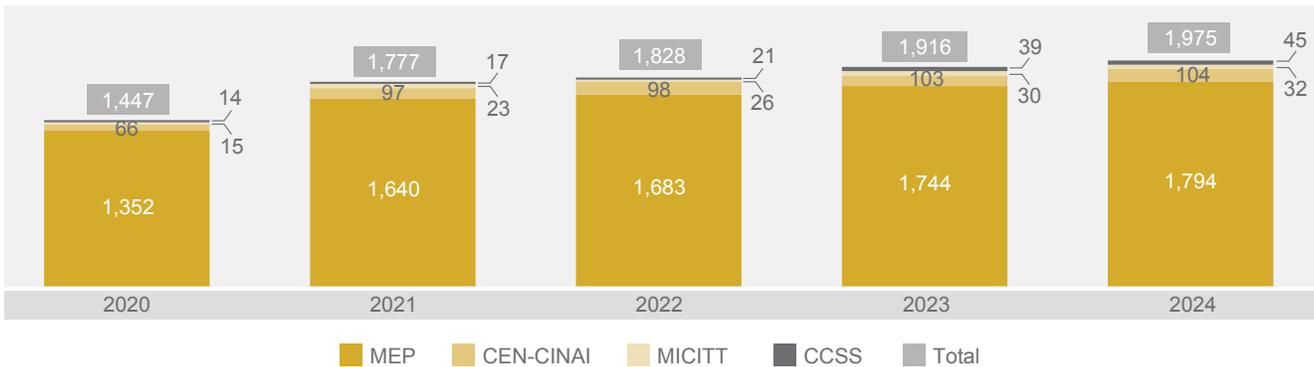
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 253. COSTA RICA: Number of Centers for the Provision of Public Services in indigenous territories that were provided Internet access through the Connected Communities Program, 2020-2024

(yearly aggregate figures)

2020	2021	2022	2023	2024
15	21	48	69	105
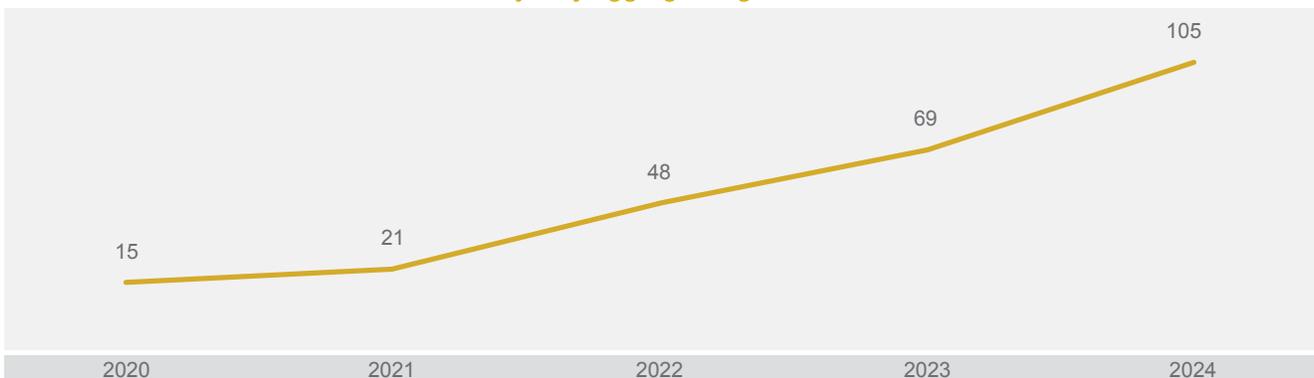
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 254. COSTA RICA: Number of inhabitants and housing units in districts with (total or partial) connectivity that were provided potential access to voice and data services through the Connected Communities Program, 2020-2024

	2020	2021	2022	2023	2024
Housing	932,564	943,986	955,260	966,467	1,001,348
Population	288,555	301,721	315,630	326,621	341,068
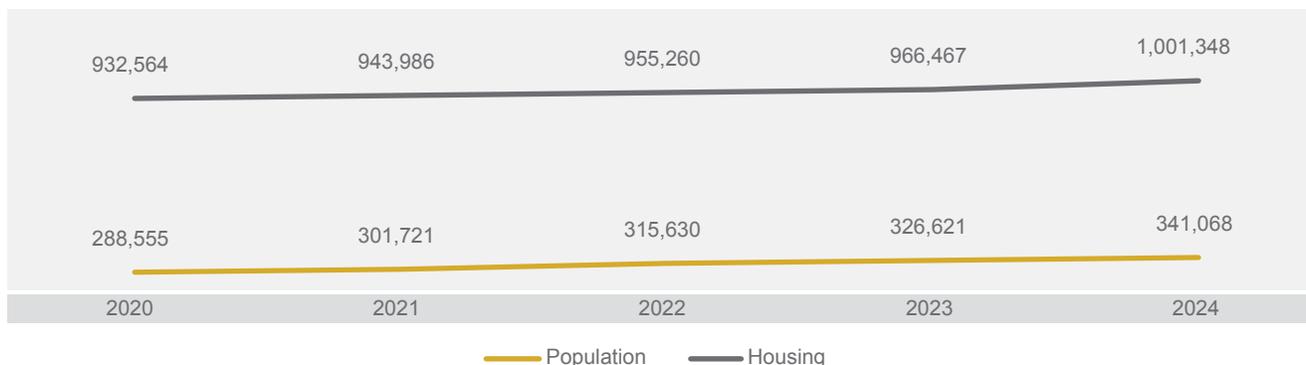
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 255. COSTA RICA: Number of fixed telephony and fixed Internet subscriptions provided through the Connected Communities Program, 2020-2024

	2020	2021	2022	2023	2024
Total	30,327	38,078	40,280	43,009	36,370
Fixed Telephony	3,351	5,000	5,102	5,679	3,725
Fixed Internet	26,976	3,078	35,178	37,330	32,645
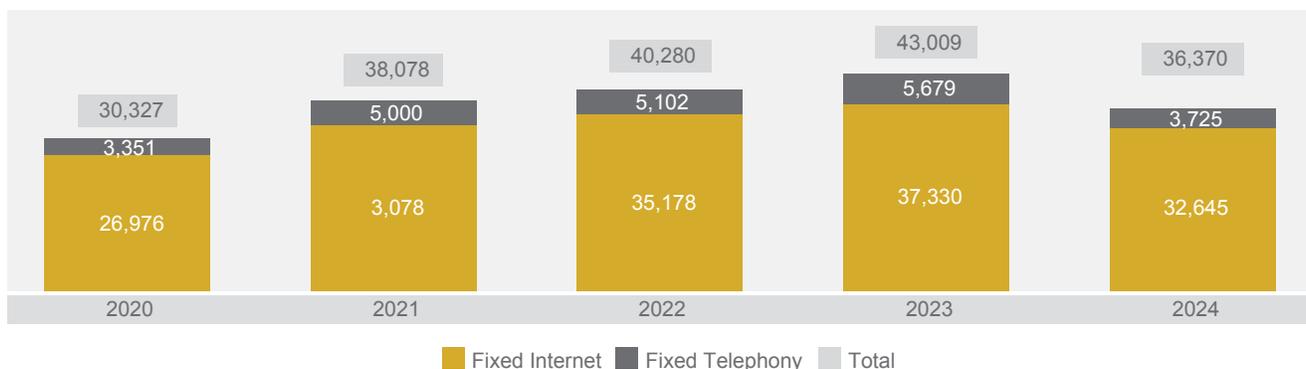
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 256. COSTA RICA: Number of mobile telephony subscriptions provided through the infrastructure made available by the Connected Communities Program, 2020-2024
(figures in terms of quantity and penetration)

	2020	2021	2022	2023	2024
Subscriptions	31,234	32,925	99,398	97,519	171,620
Penetration	0.6 %	0.6 %	1.9 %	1.9 %	3.2 %
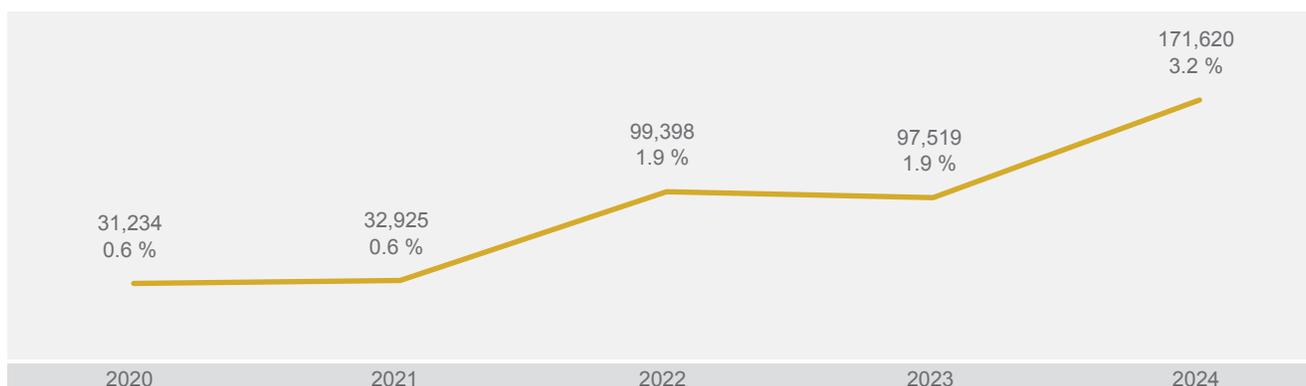
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 257. COSTA RICA: Contribution to the market penetration of fixed telephone, fixed Internet, and mobile telephone services provided through the Connected Communities Program, 2020-2024
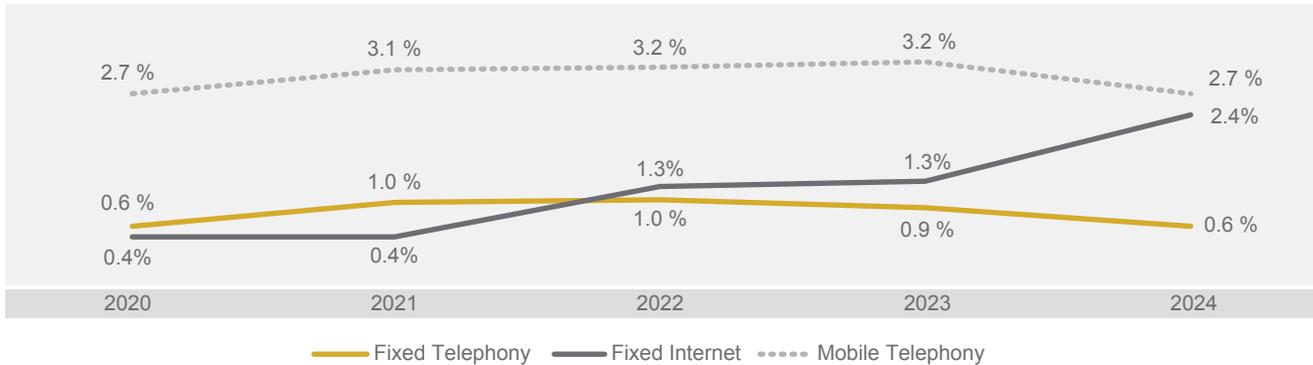
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 258. COSTA RICA: Distribution of fixed Internet subscriptions provided through the Connected Communities Program, per region,
2020-2024
(yearly figures in percentage terms)
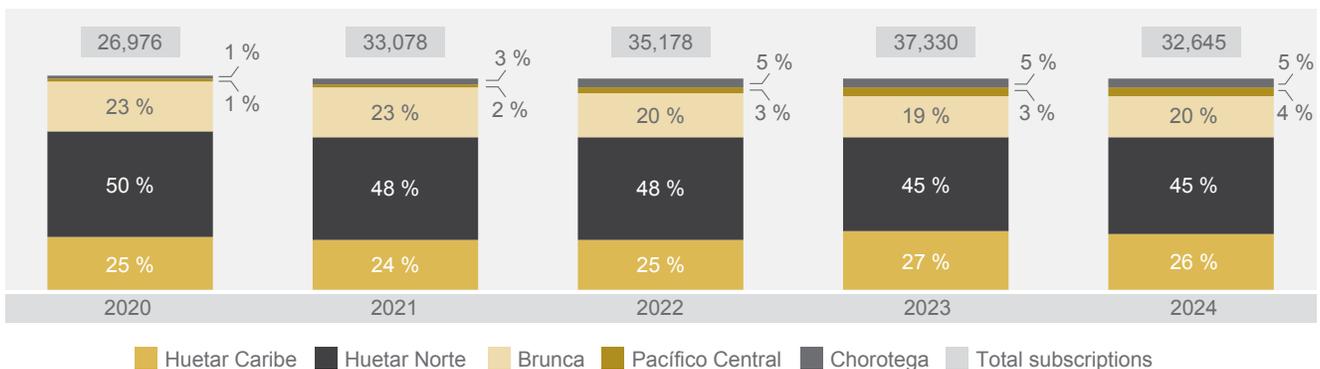
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 259. COSTA RICA: Distribution of subscriptions to the fixed telephone service provided through the Connected Communities Program by region, 2020-2024
(yearly figures in percentage terms)
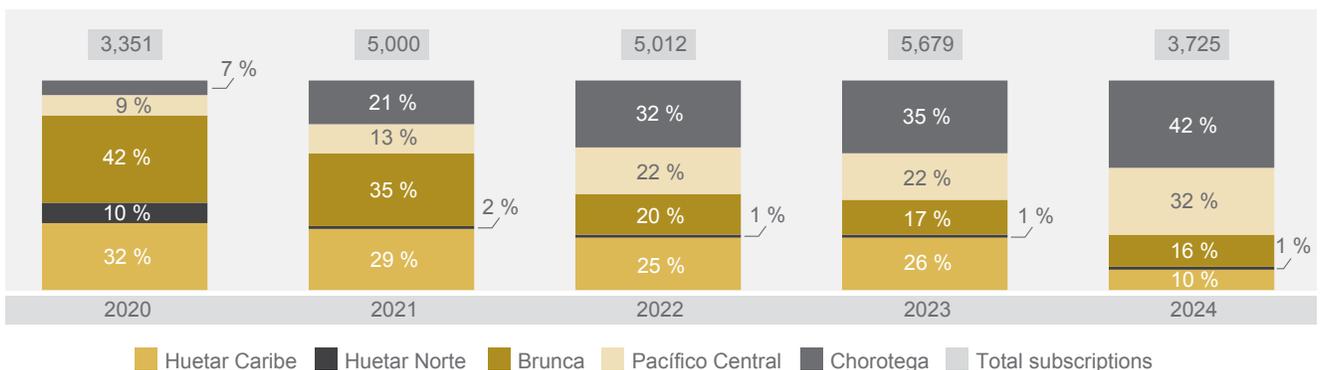
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 260. COSTA RICA: Distribution of subscriptions to the mobile telephony provided through the infrastructure facilitated by the Connected Communities Program by region, 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Total subscriptions	31,234	32,925	99,398	97,519	171,620
Brunca	17 %	17 %	27 %	30 %	29 %
Huetar Norte	56 %	56 %	19 %	21 %	13 %
Huetar Caribe	28 %	28 %	53 %	49 %	59 %

Legend: Huetar Caribe · Huetar Norte · Brunca · Total subscriptions
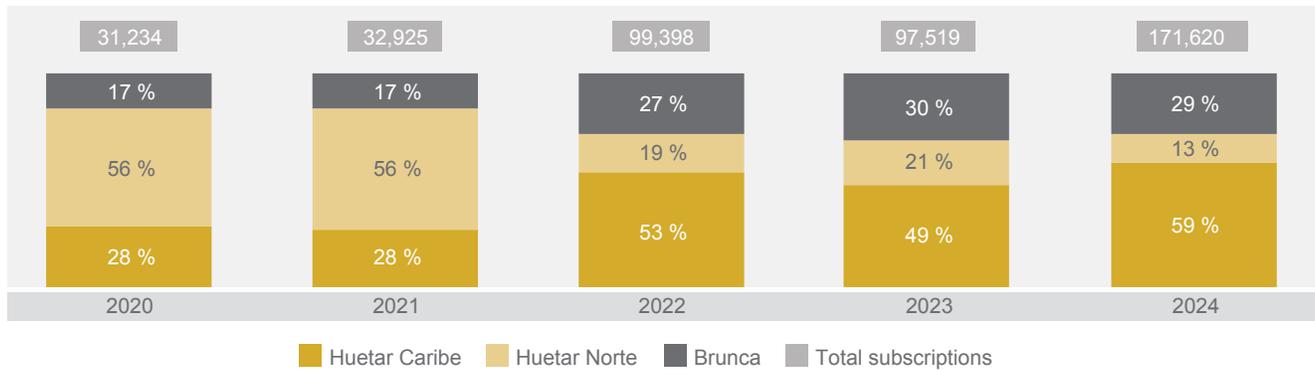
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 261. COSTA RICA: Amount of the population that has benefited from the Connected Communities Program, 2020-2024

2020	2021	2022	2023	2024
120,196	136,934	189,031	210,738	268,412
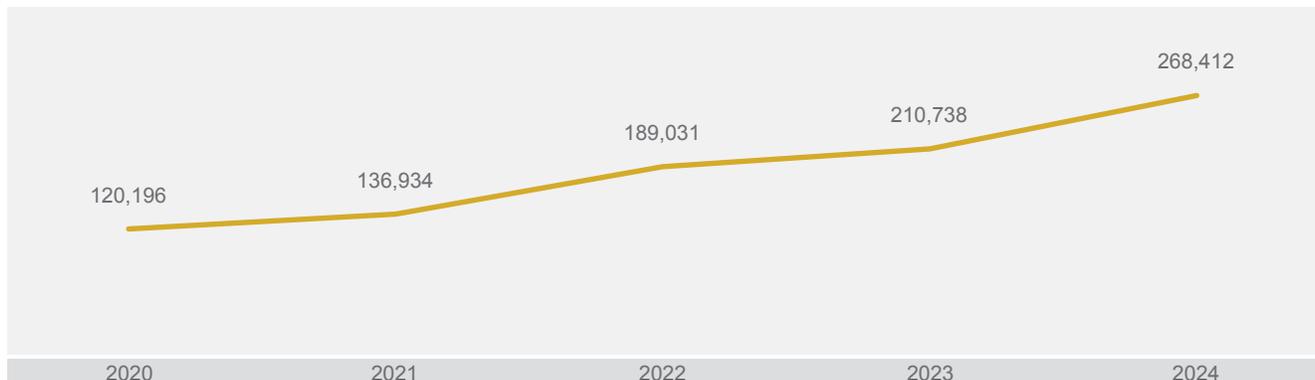
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 262. COSTA RICA: Investments made through the Connected Communities Program, 2020-2024

(yearly figures in millions of colones)

	2020	2021	2022	2023	2024
Annual investment	25,734	30,344	37,586	40,490	46,529
Accumulated investment	10,855	4,610	7,243	2,904	6,039

Legend: Accumulated investment — Annual investment
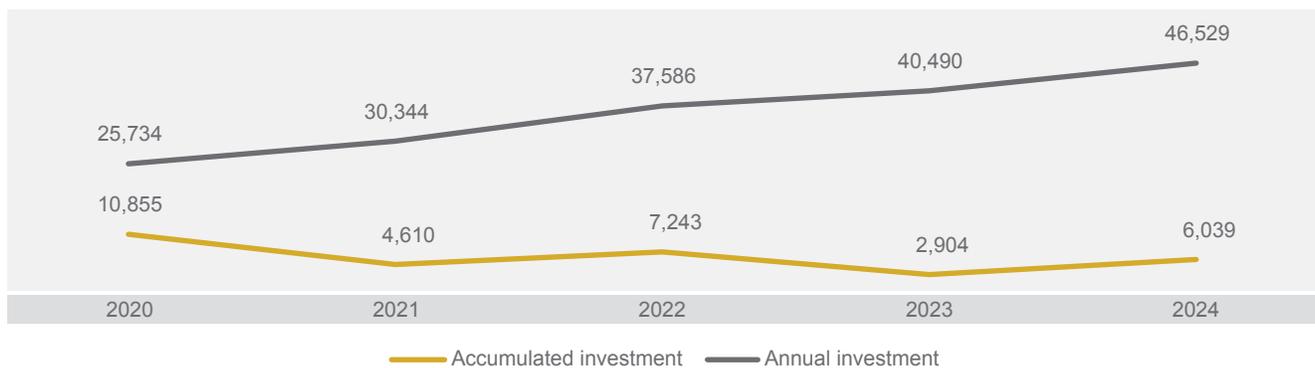
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 263. COSTA RICA: Achievement of the PNDT's Goal No. 7: to subsidize the Internet service of households with students through the Connected Households Program, 2022-2024

99 %

84 %

100 %

40 %

40,150

84,317

100,684

2022

2023

2024

■ Beneficiary households ——— Total goal achievement ------ Annual target achievement
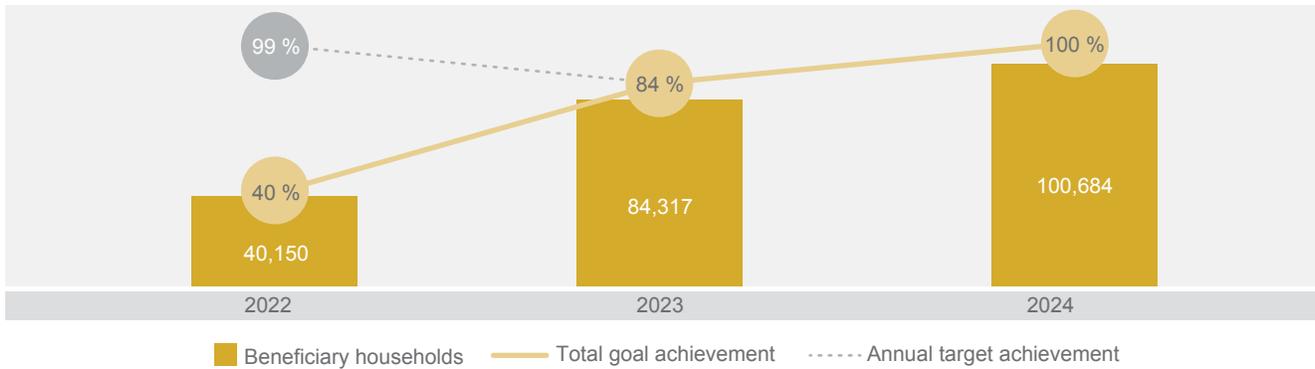
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 264. COSTA RICA: Subsidies granted under the Connected Households Program per project, 2020-2024

(yearly aggregate figures)

	2020	2021	2022	2023	2024
Total subsidies	148,426	193,789	226,552	270,875	287,242
Project 2		12,145	40,150	84,317	100,684
Project 1	148,426	181,644	186,402	186,558	186,558

■ Project 1 ■ Project 2 ■ Total subsidies
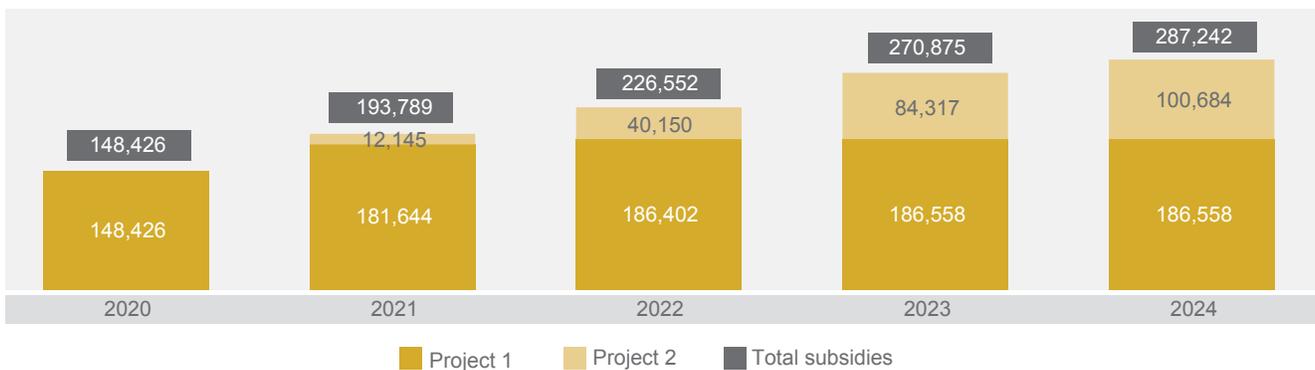
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 265. COSTA RICA: Households that have benefited from the Connected Households Program, per service status, 2020-2024

(yearly aggregate figures)

	2020	2021	2022	2023	2024
Beneficiary households	148,426	193,789	211,721	232,087	239,461
Service not active	22,331	27,277	41,311	75,897	126,082
Active service	126,095	166,512	170,410	156,190	113,379

■ Active service ■ Service not active ■ Beneficiary households
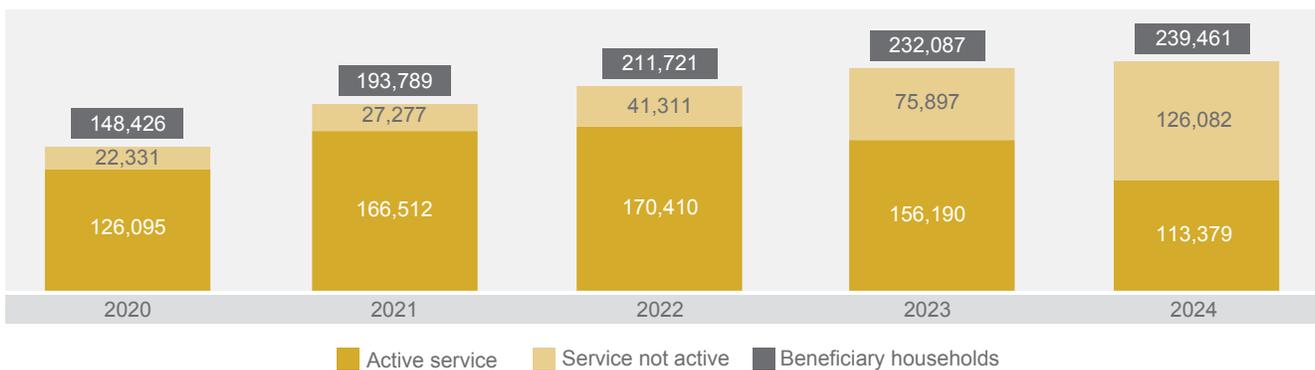
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 266. COSTA RICA: Number of households that have benefited from the Connected Households Program per quintile of income, 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Total number of beneficiaries	130,579	148,426	193,789	211,721	232,087
Quintile 3	3 %	3 %	4 %	5 %	5 %
Quintile 2	13 %	16 %	16 %	18 %	18 %
Quintile 1	84 %	81 %	80 %	78 %	77 %

Legend: Quintile 1, Quintile 2, Quintile 3, Total number of beneficiaries
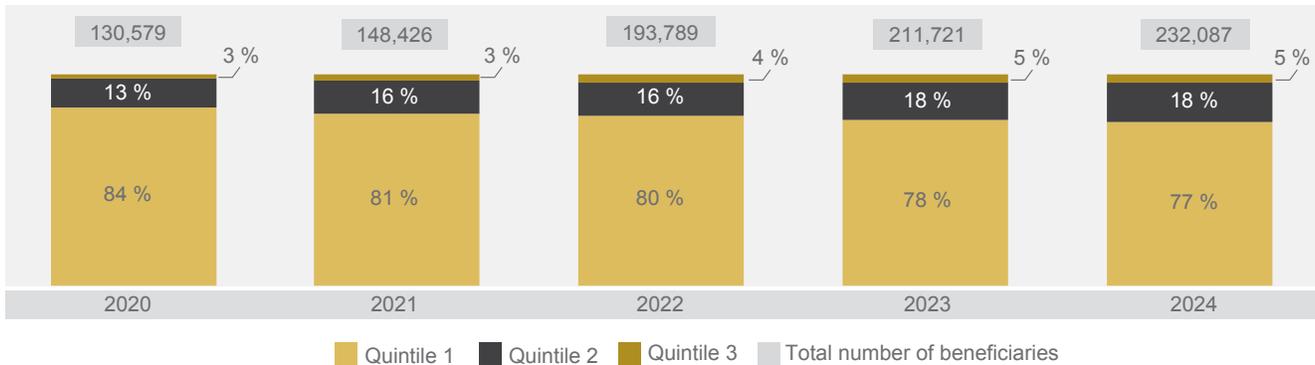
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 267. COSTA RICA: Number of households that have benefited from the Connected Households Program per operator, 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Total number of beneficiaries	148,426	193,789	211,721	232,087	239,461
Otros	6 %	8 %	9 %	9 %	9 %
ICE	18 %	16 %	17 %	15 %	21 %
Tigo	16 %	17 %	16 %	19 %	15 %
Liberty	30 %	28 %	27 %	25 %	24 %
Telecable	30 %	32 %	32 %	31 %	31 %

Legend: Telecable, Liberty, Tigo, ICE, Otros, Total number of beneficiaries

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 268. COSTA RICA: Percentage of total households that have benefited from the Connected Households Program, per province, 2020-2024

	2020	2021	2022	2023	2024
Total country	9 %	12 %	12 %	13 %	13 %
Limon	7 %	10 %	11 %	11 %	11 %
Puntarenas	13 %	17 %	18 %	20 %	20 %
Guanacaste	14 %	18 %	18 %	18 %	18 %
Heredia	7 %	9 %	9 %	9 %	9 %
Cartago	10 %	13 %	13 %	13 %	14 %
Alajuela	8 %	11 %	11 %	12 %	12 %
San Jose	9 %	11 %	11 %	12 %	12 %

Legend: San Jose, Alajuela, Cartago, Heredia, Guanacaste, Puntarenas, Limon, Total country
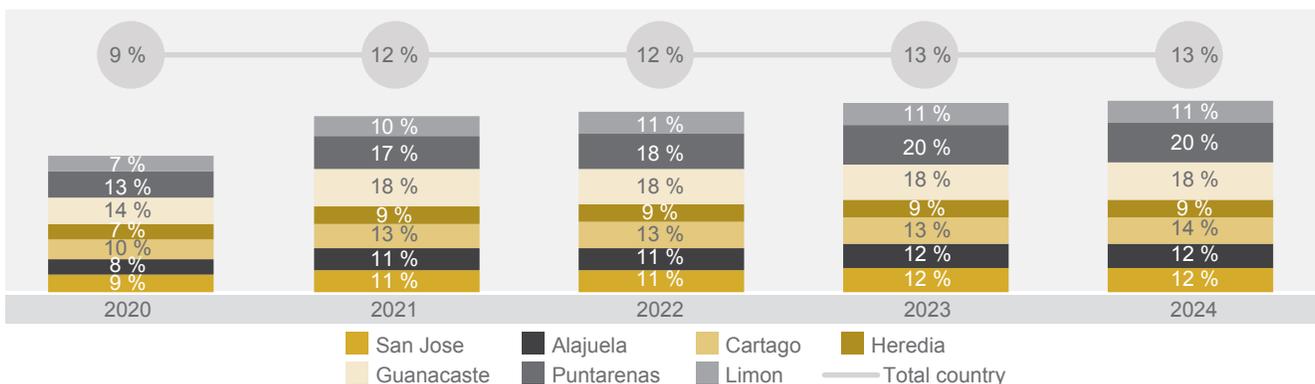
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 269. COSTA RICA: Districts with coverage under the Connected Households Program, 2020-2024

(figures in quantity and percentage terms)

	2020	2021	2022	2023	2024
	97 % 445	97 % 483	99 % 484	99 % 487	99 % 488
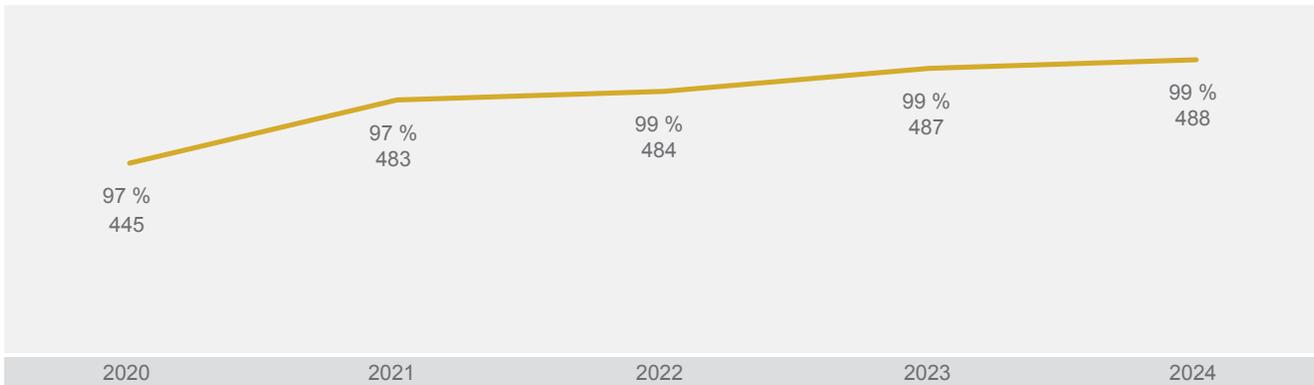
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

MAP NO. 3. COSTA RICA: Districts with coverage under Project No. 2 (Goal No. 7) of the Connected Households Program, 2024

Program presence: ● No ● Yes

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 270. COSTA RICA: Contribution to market penetration of fixed Internet access service per 100 households provided through the Connected Households Program, 2020-2024
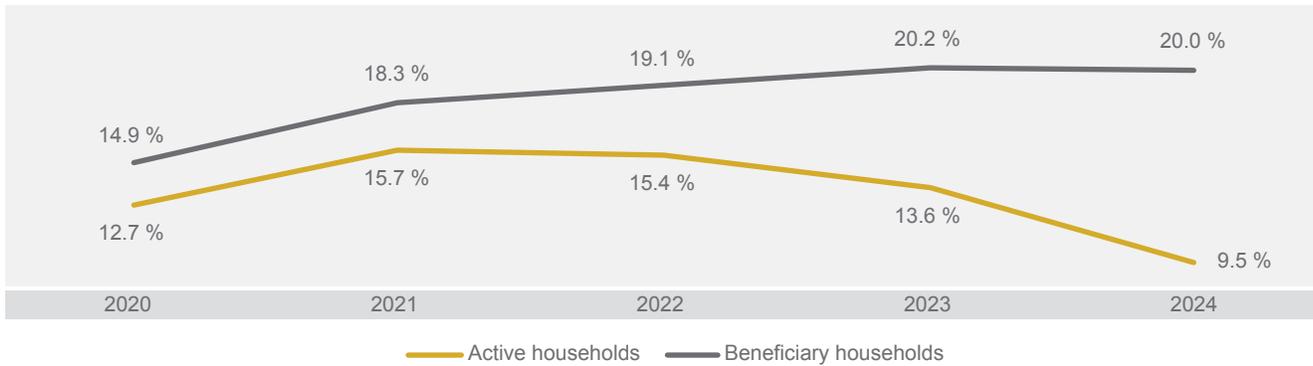
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 271. COSTA RICA: Population benefiting from the Connected Households Program and percentage of total population, 2020-2024
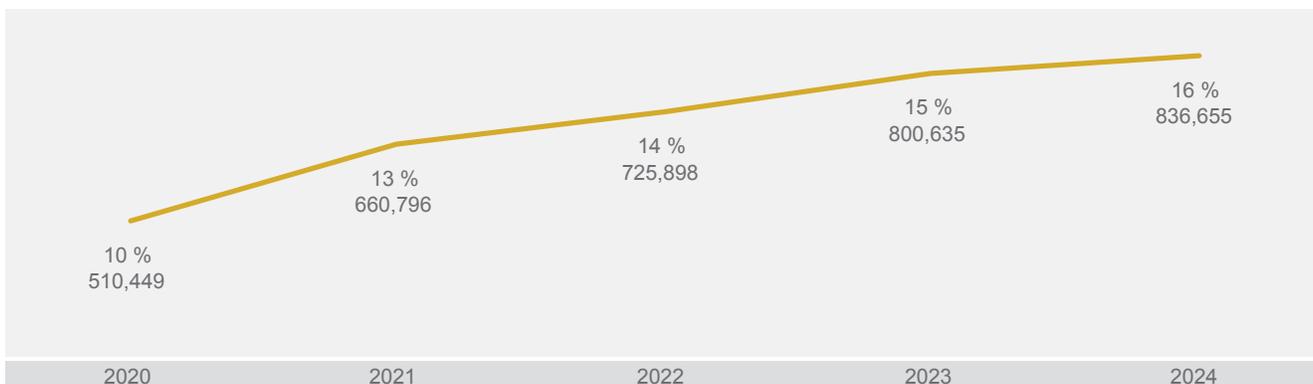
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 272. COSTA RICA: Investments made through the Connected Households Program, 2020-2024
(yearly figures in millions of colones)
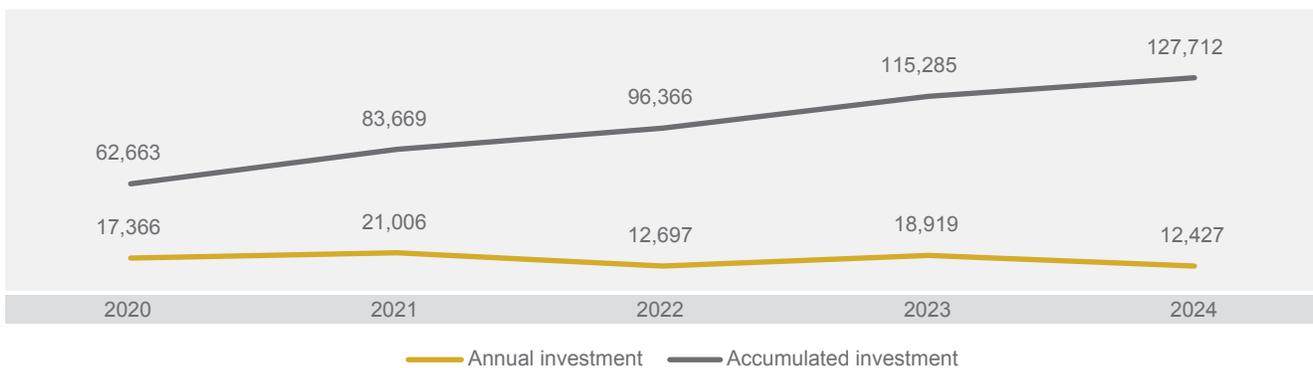
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 273. COSTA RICA: Number of devices delivered to CPSPs for accessing ICTs through the Provisioned Public Centers Program, 2020-2024

(yearly aggregate figures)

115,317   123,643   123,643

36,831   36,831

| 2020 | 2021 | 2022 | 2023 | 2024 |
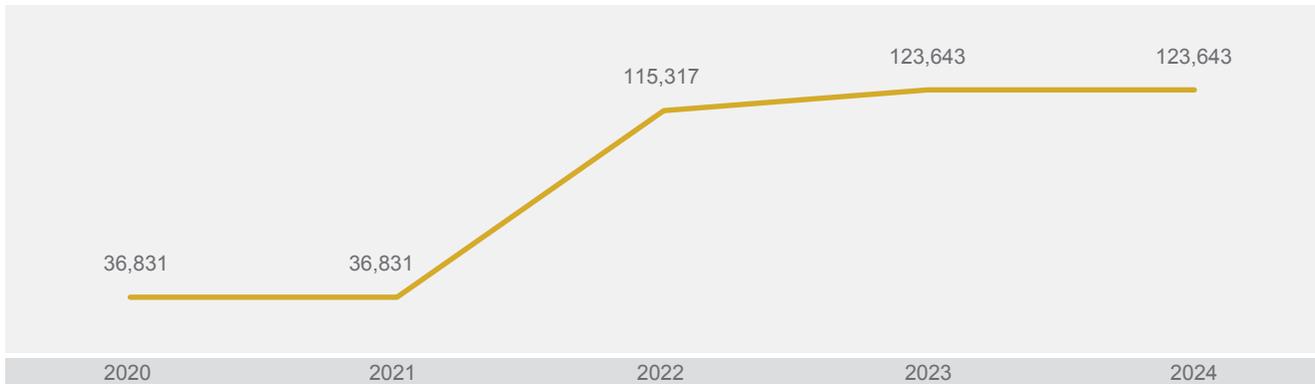
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 274. COSTA RICA: Percentage of devices for accessing ICTs delivered through the Provisioned Public Centers Program, per institution, 2020-2024

(figures in percentages and cumulative annual figures)

36,831	36,831	115,317	123,643	123,643
3 %	3 %	1 % 4 %	1 % 3 %	1 % 3 %
12 %	12 %	4 %	4 %	4 %
14 %	14 %			
72 %	72 %	91 %	92 %	92 %
2020	2021	2022	2023	2024

■ CENCINAI   ■ CCSS   ■ MICITT   ■ MEP   ■ Total number of devices
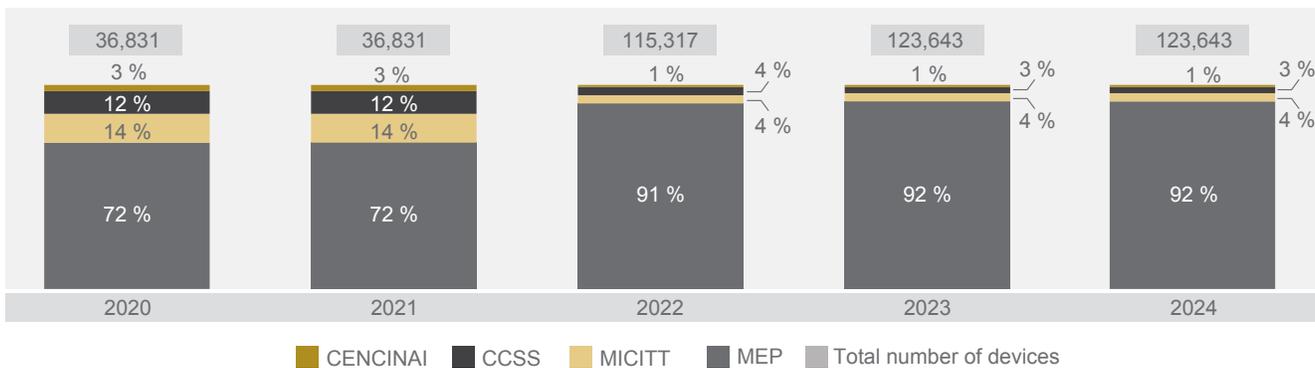
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

MAP NO. 4. COSTA RICA: Districts with coverage under the Provisioned Public Centers Program, 2024

Program presence: ● No ● Yes
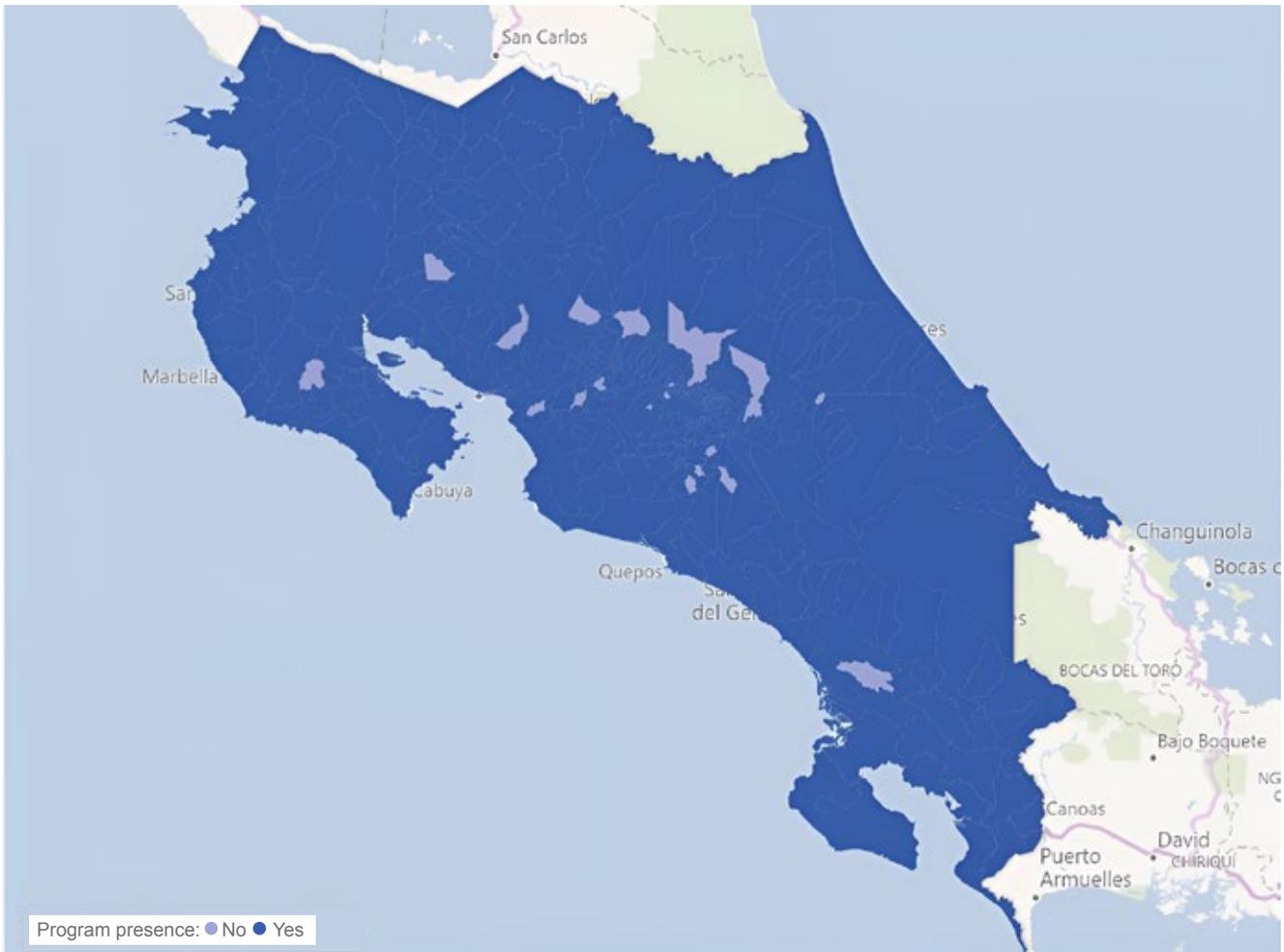
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 275. COSTA RICA: Investments made through the Provisioned Public Centers Program, 2020-2024
(yearly figures in millions of colones)
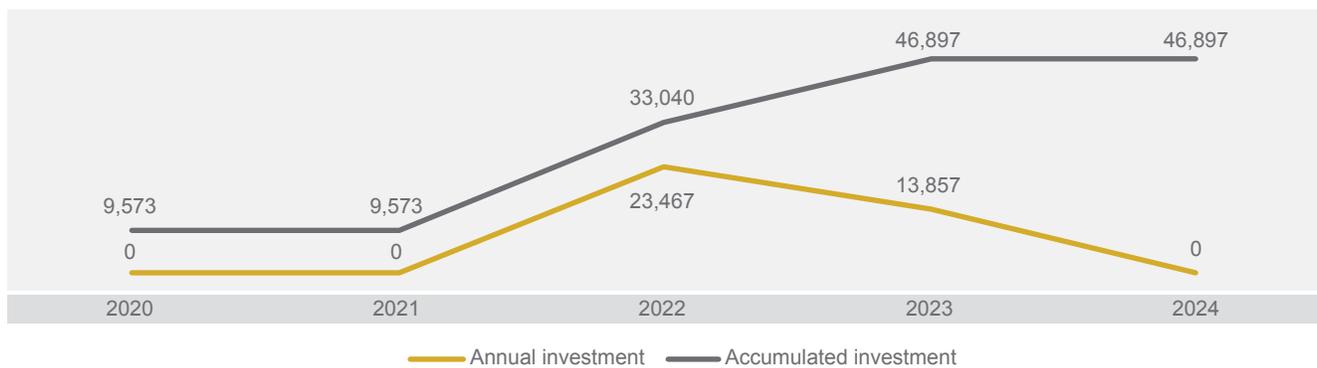
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 276. COSTA RICA: Free digital Internet access zones put into service through the Connected Public Spaces Program per state, 2022-2024

	2022	2023	2024
Subsidy ended without service	17	37	86
Subsidy ended with active service	38	65	119
Active subsidy	458	411	308
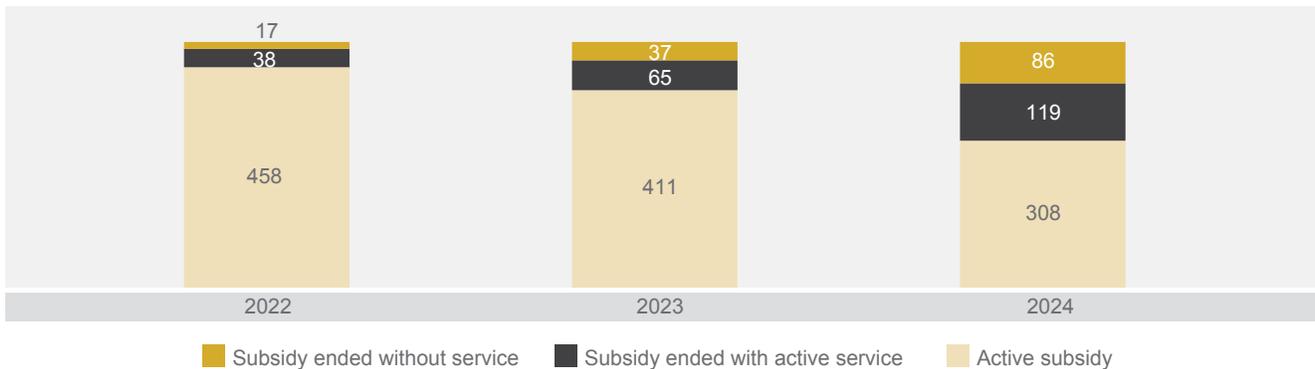
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 277. COSTA RICA: Distribution of free digital Internet access zones with active subsidies from the Public Spaces Program per type of zone, 2020-2024

(figures in percentage terms)

	2020	2021	2022	2023	2024
Total	512	515	460	413	308
Civic Center*	1 %	1 %	2 %	2 %	1 %
Train station	5 %	5 %	6 %	7 %	5 %
Library*	12 %	12 %	13 %	15 %	1 %
Public Space	81 %	81 %	79 %	77 %	93 %
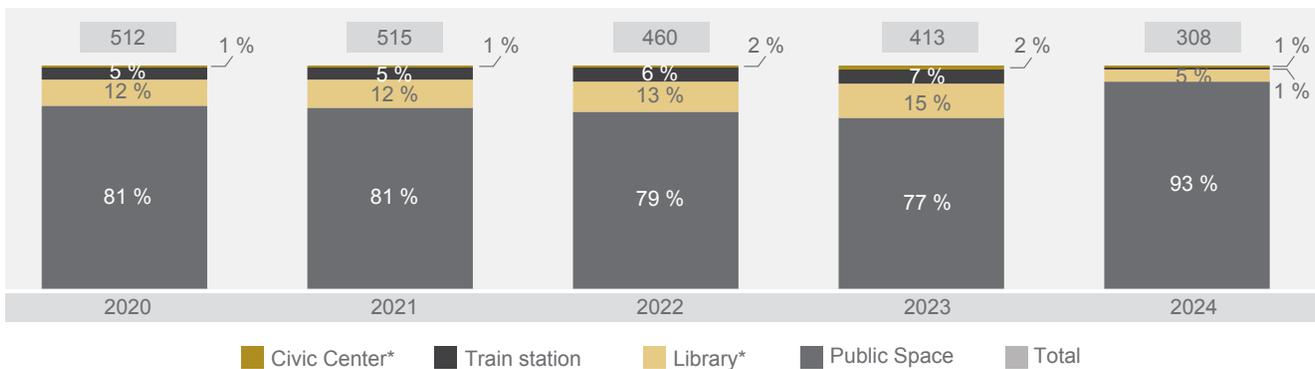
Note: *Two zones are categorized as both libraries and civic centers in Guararí and Aguas Zarcas.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 278. COSTA RICA: Distribution of free digital Internet access zones with active subsidies from the Connected Public Spaces Program per province, 2020-2024

(figures in percentage terms)

	2020	2021	2022	2023	2024
Total	510	513	458	411	308
Limon	5 %	5 %	6 %	7 %	8 %
Puntarenas	11 %	11 %	12 %	13 %	16 %
Guanacaste	10 %	10 %	10 %	9 %	6 %
Heredia	12 %	12 %	9 %	9 %	6 %
Cartago	12 %	12 %	14 %	13 %	16 %
Alajuela	23 %	23 %	25 %	27 %	29 %
San Jose	26 %	26 %	24 %	23 %	19 %
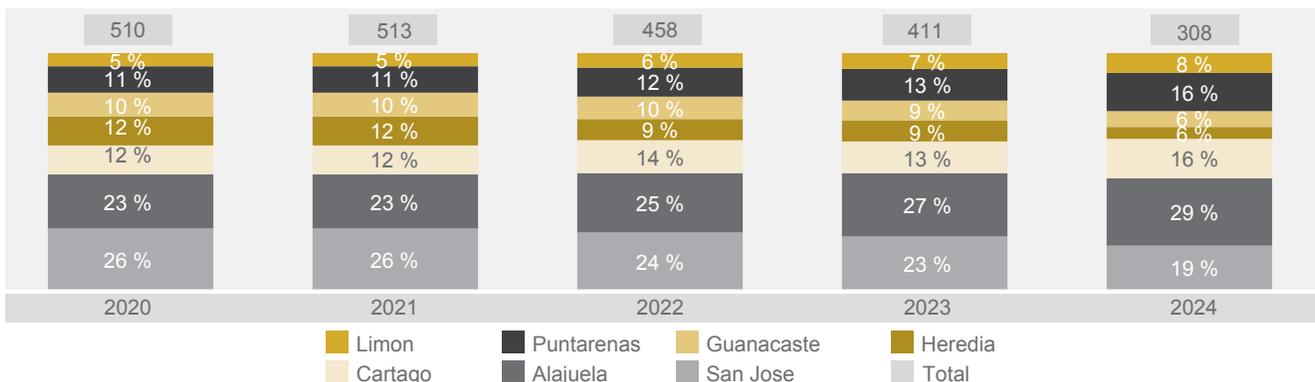
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 279. COSTA RICA: Districts with free digital Internet access zones with active subsidies from the Connected Public Spaces Program, 2020-2024

	2020	2021	2022	2023	2024
	313	315	294	264	221
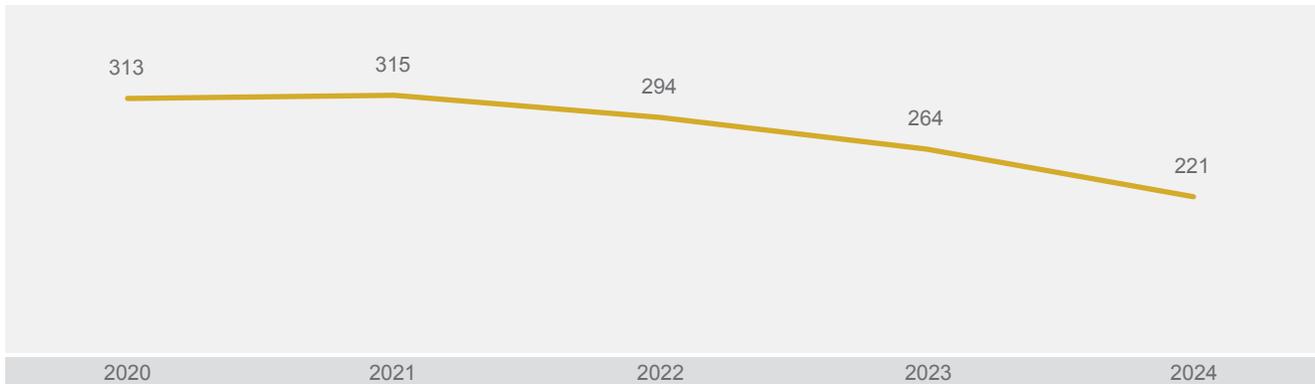
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 280. COSTA RICA: Total users and data traffic (GB) in free digital Internet access zones under the Connected Public Spaces Program, 2020-2024

Data traffic (GB): 715,716 — 1,683,033 — 2,050,106 — 1,531,524 — 1,636,506

Total users: 242,929 — 889,843 — 1,049,681 — 706,507 — 607,937

— Total users   — Data traffic (GB)
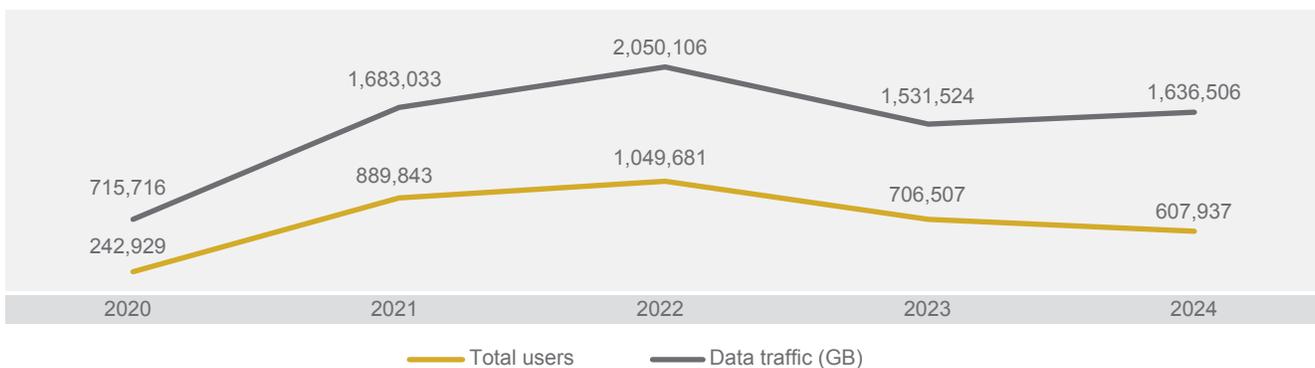
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 281. COSTA RICA: Hours of use and sessions initiated by users in zones with free Internet access made available through the Connected Public Spaces Program, 2020-2024

Sessions started: 2,957,749 — 6,942,592 — 8,079,075 — 5,551,326 — 4,976,978

Hours of use: 1,358,995 — 3,862,881 — 4,755,330 — 3,337,615 — 2,705,882

— Hours of use   — Sessions started
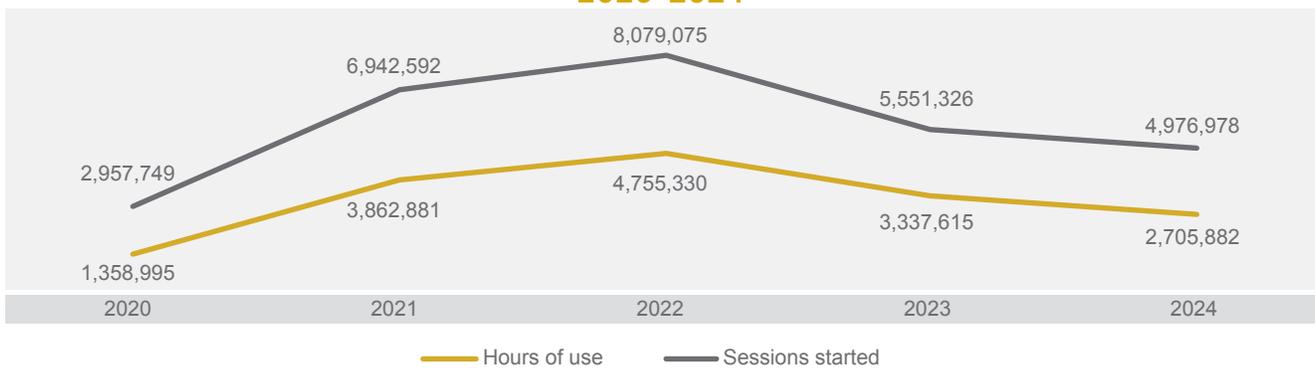
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 282. COSTA RICA: Investments made through the Connected Public Spaces Program, 2020-2024

(yearly aggregate figures in millions of colones)

Accumulated investment: 4,721; 11,271; 18,978; 24,936; 29,612

Annual investment: 3,740; 6,550; 7,708; 5,957; 4,676

— Annual investment   — Accumulated investment
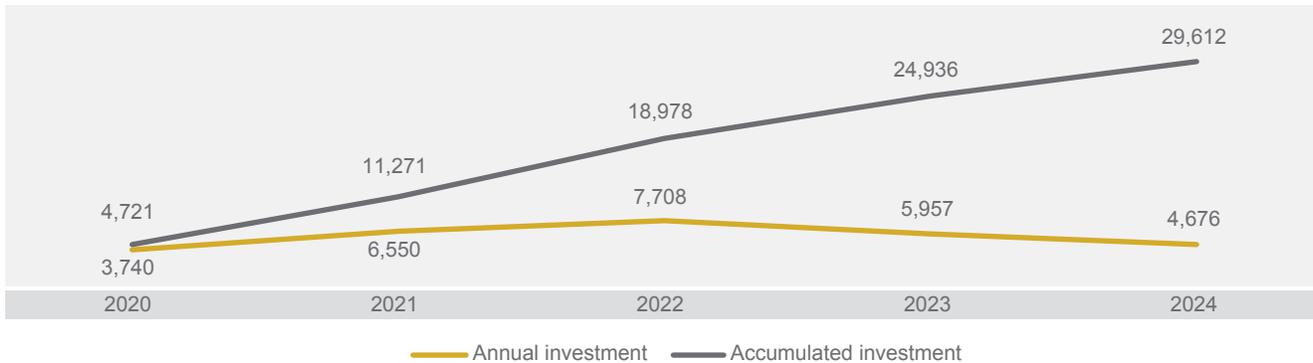
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 283. COSTA RICA: Compliance with PNDT Goal 5: Progress in the implementation of the FONATEL Education Network, 2022-2024

2022: 25.8 % (26 %)
2023: 26.5 % (26 %)
2024: 38.2 % (38 %)

■ Fonatel Axis Progress   ■ Total goal achievement
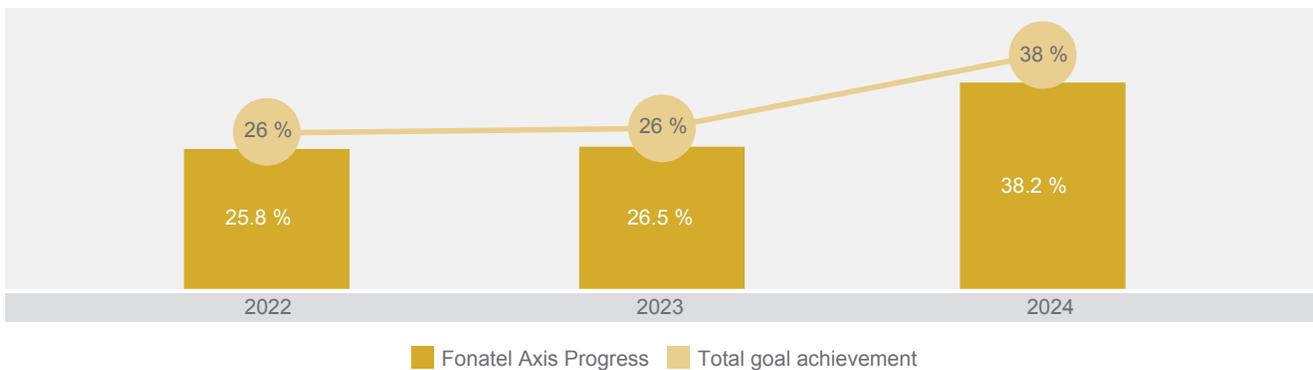
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 284. COSTA RICA: Education centers served by the Education Network program per state, 2022-2024

CE visited for analysis: 725 / 748 / 682
CE with technical requirements: 725 / 747 / 682
CE with delivered design: 642 / 693 / 682
CE approved design: 625 / 685 / 682
CE with connectivity and internal network: 601 / 682 / 682
CE connected to the Educational Network: 600 / 682 / 682

■ 2022   ■ 2023   ■ 2024
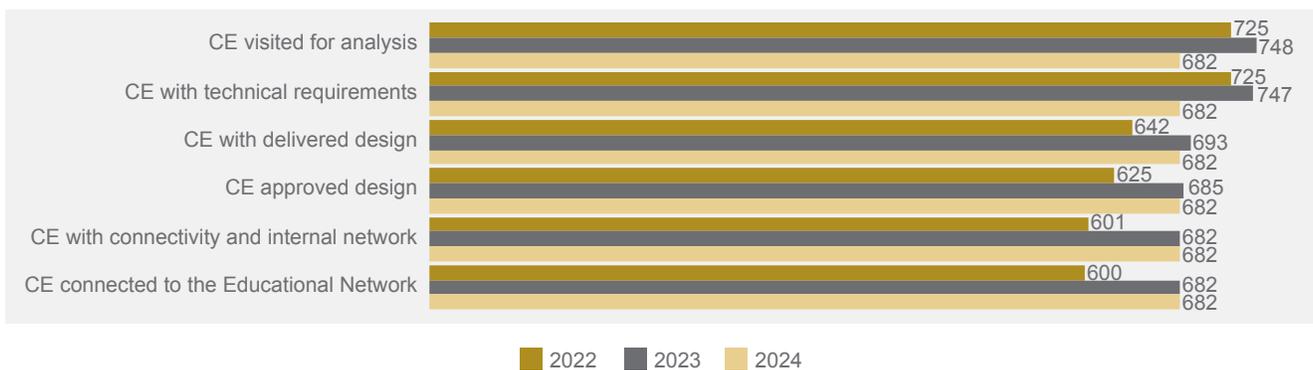
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 285. COSTA RICA: Distribution of education centers connected through the Education Network program per bandwidth in Mbps, 2024

●	100 Mbps
●	175 Mbps
●	300 Mbps
●	40 Mbps
●	15 Mbps
●	500 Mbps

34 5 %
114 2 %
53 8 %
352 52 %
70 10 %
159 23 %
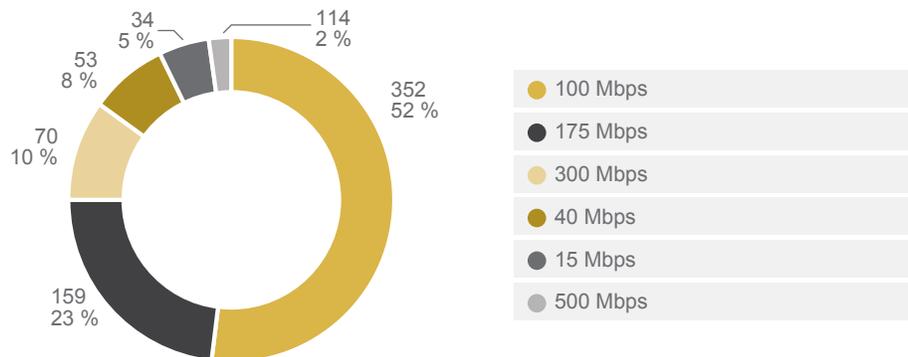
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 286. COSTA RICA: Distribution of education centers connected through the Education Network program per operator, 2024

●	COOPEGUANACASTE
●	RACSA-ICE-PC
●	TELECABLE
●	LIBERTY

39 6 %
253 37 %
185 27 %
205 30 %
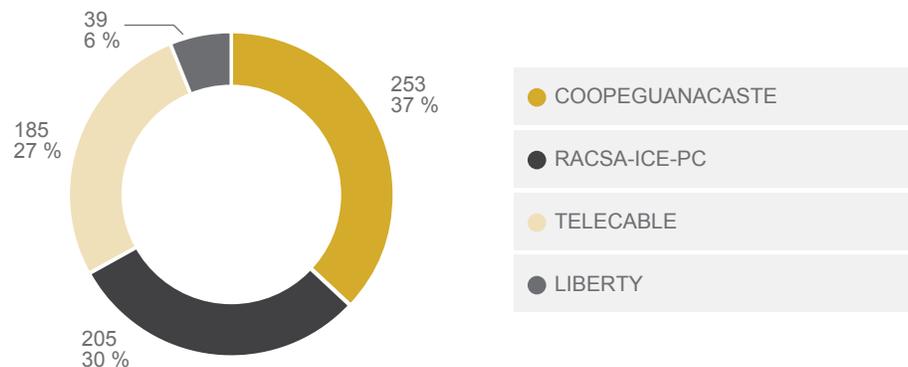
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

MAP NO. 5. COSTA RICA: Districts with coverage under the Education Network Program, 2024

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 287. COSTA RICA: Distribution of education centers connected through the Education Network Program per province, 2024

Province	Value	%
Limon	157	23 %
Alajuela	156	23 %
Puntarenas	109	15 %
Guanacaste	102	16 %
San Jose	96	14 %
Heredia	37	5 %
Cartago	25	4 %
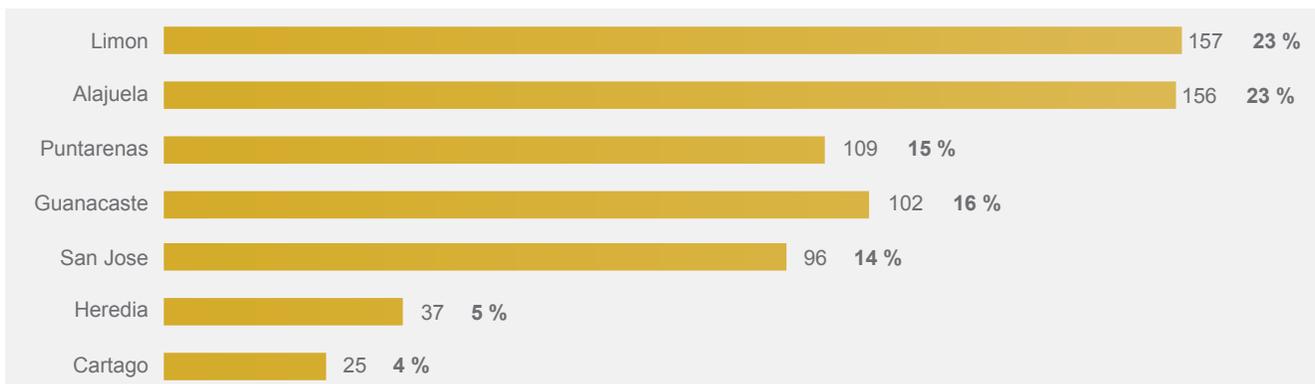
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 288. COSTA RICA: Students in education centers connected through the Education Network Program, 2022-2024

(yearly aggregate figures)

- 2021: 33,643
- 2022: 141,861
- 2023: 161,564
- 2024: 162,210
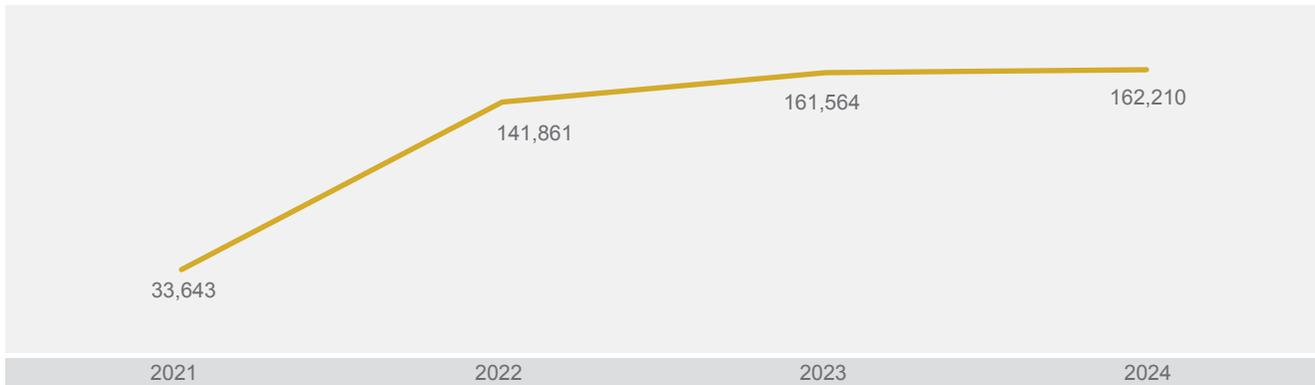
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 289. COSTA RICA: Total users and data traffic (TB) in education centers connected through the Education Network Program, 2022-2024

- 2020: 15,598 / 6
- 2021: 381,218 / 956,897
- 2022: 1,209,905 / 1,916,943
- 2024: 1,955,687 / 2,715,912

Total users — Data traffic (TB)
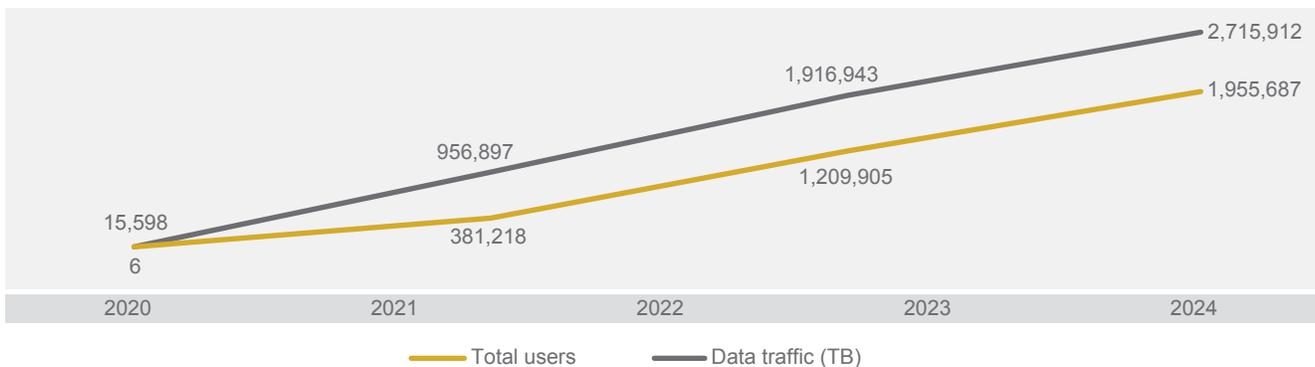
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 290. COSTA RICA: Hours of use and sessions initiated in education centers connected through the Education Network program, 2022-2024

- 2021: 80,263 / 69,125
- 2022: 5,920,783 / 5,353,434
- 2023: 13,032,012 / 9,663,609
- 2024: 18,376,603 / 12,443,642

Hours of use — Sessions started
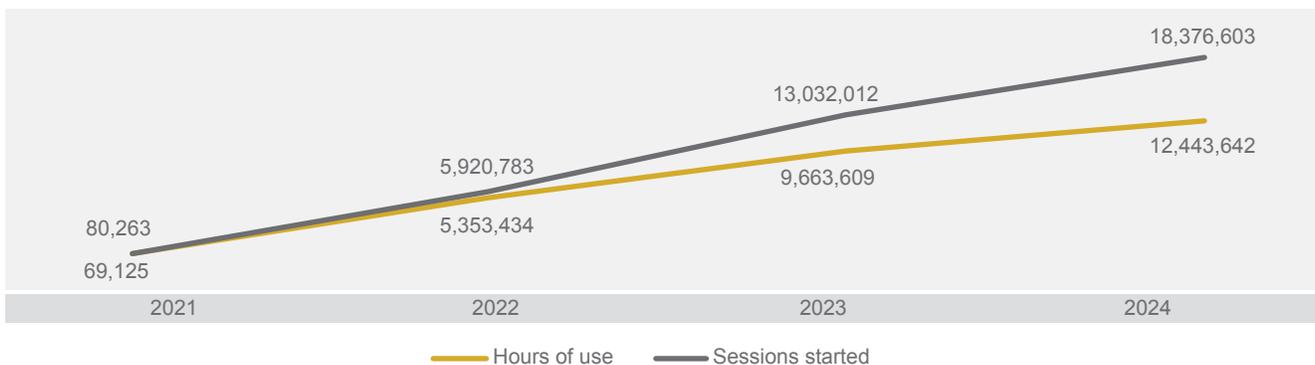
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

GRAPH 291. COSTA RICA: Investment executed through the Education Network program, 2021-2024

(yearly aggregate figures in millions of colones)

	2021	2022	2023	2024
Total	1,013	4,659	7,417	7,437
Accumulated	1,013	5,672	13,089	20,526
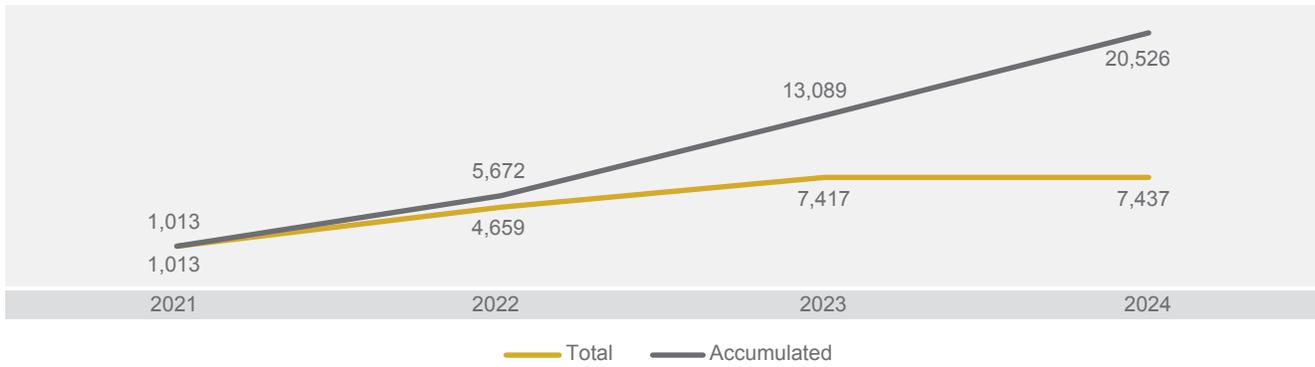
Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

INTERNATIONAL
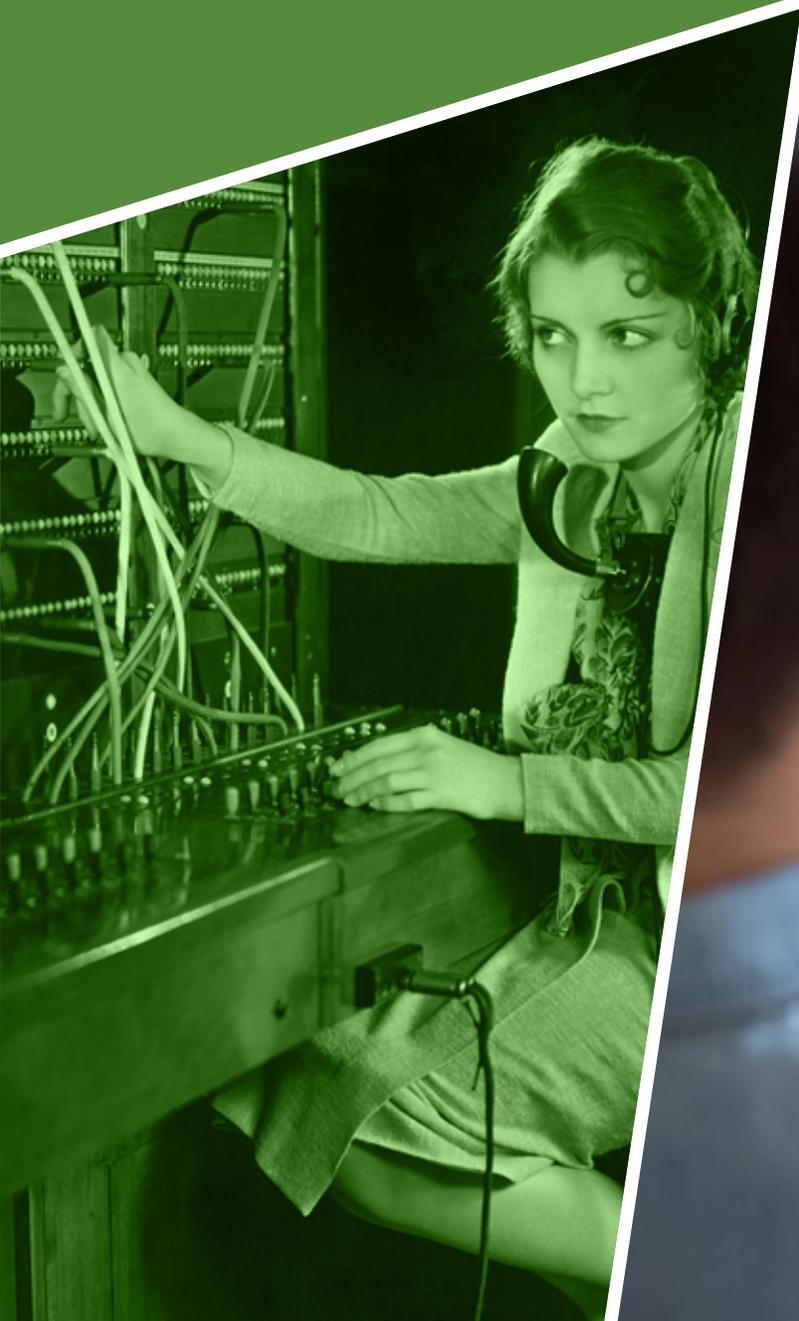
The purpose of this section is to examine Costa Rica's international ranking, to measure how much the telecommunications sector has contributed to the development of the country, and to analyze the behavior and possible future trends of the different services across international markets.

The following sections will be developed for this analysis:

• Analysis of general international indicators

At the time of this report, the International Telecommunication Union (ITU) did not yet have public information for the period 2024, so it was not possible to include information for that year in this edition. Instead, figures from 2023 are used, taking ITU data as the source of information.

ANALYSIS OF GENERAL INTERNATIONAL INDICATORS

This analysis provides information on Costa Rica's ranking in the most prominent general indicators with respect to the leading countries in telecommunications and Latin American countries. On the other hand, service quality indicators are currently being redesigned in accordance with the ITU. The countries used for comparison are those with the highest level of ICT development, such as European and Asian countries. In the case of Latin America, countries with available information for the years under analysis were used.

Fixed telephony, mobile telephony, and fixed and mobile Internet access services are analyzed in relation to the evolution of the number of subscribers and their total penetration. As a result, the indicators are constantly updated and monitored by the ITU, which allows for comparability between countries.

"
In Latin America, Costa Rica ranks fifth in fixed Internet access penetration
"

The penetration of fixed telephony services (plain old telephone service & VoIP), which is the ratio of users to the country's total population, has shown, in general, a downward trend in recent years. This situation is not similar in Costa Rica, as the number of subscriptions to this service has increased in recent years, but it continues to decline in countries such as Korea, Switzerland, the Netherlands, the United States, Singapore, and Sweden.

This trend is similar, but slower, in Latin American countries such as Argentina, Brazil, and Chile, among others, where the penetration of this service has also remained virtually unchanged, with only Mexico and Uruguay showing a decline of one percentage point.

In 2023, according to ITU records, the countries with the highest fixed telephony penetration are Korea, the United Kingdom, and Switzerland, with 42.8 %, 38.8 %, and 33.9 %, respectively. In the case of Costa Rica, penetration in 2023 was 13.3 %, while in 2024 it fell to 11.5 %, placing the country in seventh position in Latin America, behind Uruguay, Mexico, Panama, Argentina, Brazil, Chile, Colombia, and El Salvador (see Graph No. 292). It should be noted that Costa Rica rose four places compared to 2022.

For mobile telephone service (including prepaid and postpaid), Costa Rica remains among the countries with the highest penetration, maintaining its fourth position in 2023, globally, with 146 %, surpassing countries such as Sweden, Finland, Denmark, among other European countries. It should be noted that the penetration rate achieved in 2024 (132 %) is consistent with the trend of remaining at the top of this penetration indicator, although it shows a decrease.

nevertheless, the 2024 figure is equal to that recorded in 2023 by the rest of the countries, as can be seen in Graph No. 293.

In the case of mobile telephone service by payment method, the proportion of prepaid subscriptions decreased compared to 2022, but Costa Rica continues to rank among the countries with the highest proportion of prepaid lines. This year, it ranks sixth, surpassed by Guatemala, Panama, Mexico, Colombia, and the Dominican Republic. These results contrast with those observed in European and Asian countries, where the relationship is reversed, as shown in Graph No. 294.

As in the previous edition of the Telecommunications Sector Statistics, Costa Rica 2023, there continues to be an inverse relationship between the proportion of prepaid services and per capita income, according to data from the ITU Report for 2023. Mobile telephony subscribers in countries with a higher level of development and greater purchasing power generally prefer to purchase postpaid subscriptions, while users in countries with less purchasing power generally prefer to purchase prepaid subscriptions. The details can be seen in Graph No. 295.

Fixed Internet service penetration, measured by connections per 100 inhabitants, has remained steady in Costa Rica, with slight growth of around 1.2 % per year, surpassing Mexico, Panama, and Colombia in 2023. Leading countries in Latin America have maintained virtually the same penetration compared to 2022, with Uruguay continuing to lead in this field with 32.4 % at the Latin American level. According to ITU data from 2023, European and Asian countries have higher values that are almost double those of Costa Rica. Switzerland, South Korea, Norway, Denmark, and the Netherlands stand out with values close to 45 %.

For mobile Internet service, Costa Rica continues to show an important position in relation to the penetration of this service for 2023, remaining within the top five in Latin America, surpassing countries such as Brazil and Mexico, and globally, the US is in first place, followed by Singapore. The details can be seen in Graph No. 297.

To conclude this section on the international framework, the relative weight of telecommunications revenue in relation to gross domestic product (GDP) in dollars is quantified for each country. The most recent data on telecommunications revenue available in ITU records is from 2023, so this measurement is used to ensure international comparability of the indicator. However, other sections of this report include figures updated to 2024 for Costa Rica. As shown in Graph No. 298, the Dominican Republic, South Korea, and Honduras have the highest ratios compared to the rest of the world, followed by a group of countries, including Costa Rica, Mexico, Peru, and Switzerland, where the ratio is 1.9 %.

In Latin America, Costa Rica ranks fourth in mobile phone penetration

GRAPH 292. Fixed telephony subscriptions per 100 inhabitants in 2023
(figures in percentage terms)

REST OF THE WORLD

Country	Value
Korea (Rep.)	42.8
United Kingdom	38.8
Switzerland	33.9
Singapore	33.0
USA	25.6
Netherlands	23.6
Denmark	12.7
Finland	2.8
Norway	2.7

LATIN AMERICA

Country	Value
Uruguay	35.6
Mexico	19.8
Panama	18.2
Argentina	15.4
Colombia	13.9
El Salvador	13.7
Costa Rica	13.3
Brazil	12.1
Guatemala	10.7
Chile	10.1
Dominican Republic	10.1
Peru	4.44
Honduras	4.17
Nicaragua	3.43
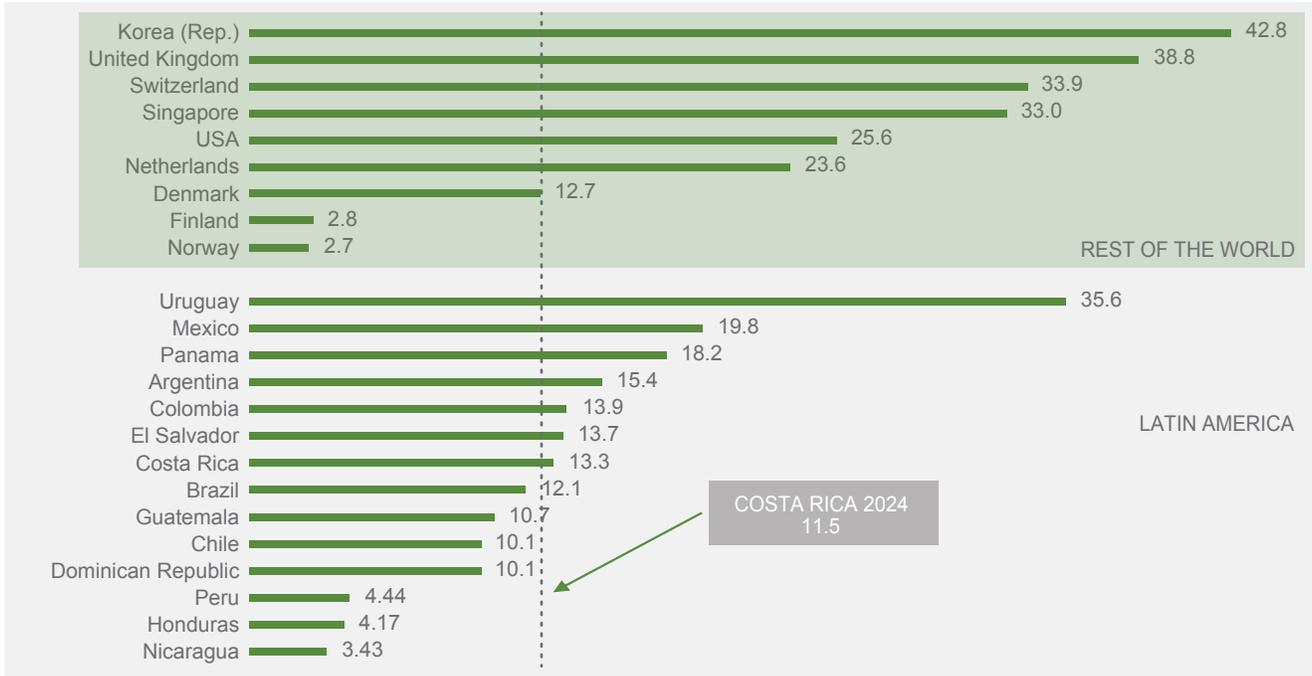
COSTA RICA 2024
11.5

Source: SUTEL, General Directorate of Markets, with information from the ITU. Includes plain old telephone and VoIP service subscriptions. Costa Rica, 2023-2024.

GRAPH 293. Mobile telephony subscriptions per 100 inhabitants in 2023
(figures in percentage terms)

REST OF THE WORLD

Country	Value
Singapure	167
Korea (Rep.)	162
Sweden	140
Finland	127
Denmark	126
United Kingdom	123
Switzerland	123
Netherlands	117
Norway	112
USA	112

#N/D

LATIN AMERICA

Country	Value
El Salvador	183
Colombia	167
Panama	157
Costa Rica	146
Uruguay	142
Argentina	138
Chile	136
Peru	122
Guatemala	114
Mexico	108
Nicaragua	106
Brazil	101
Dominican Republic	91.9
Honduras	74.4
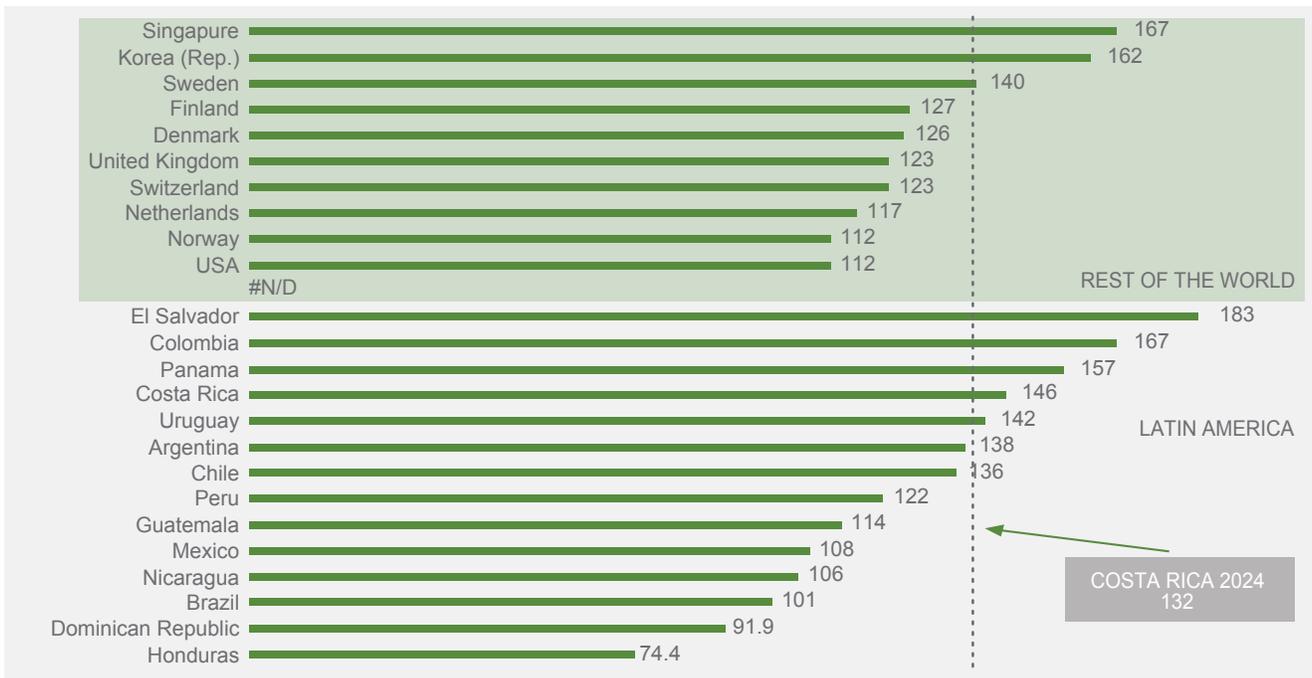
COSTA RICA 2024
132

Source: SUTEL, General Directorate of Markets, with information from the ITU. Costa Rica, 2023-2024.

GRAPH 294. Percentage distribution of postpaid and prepaid mobile telephony subscriptions in 2023

(figures in percentage terms)
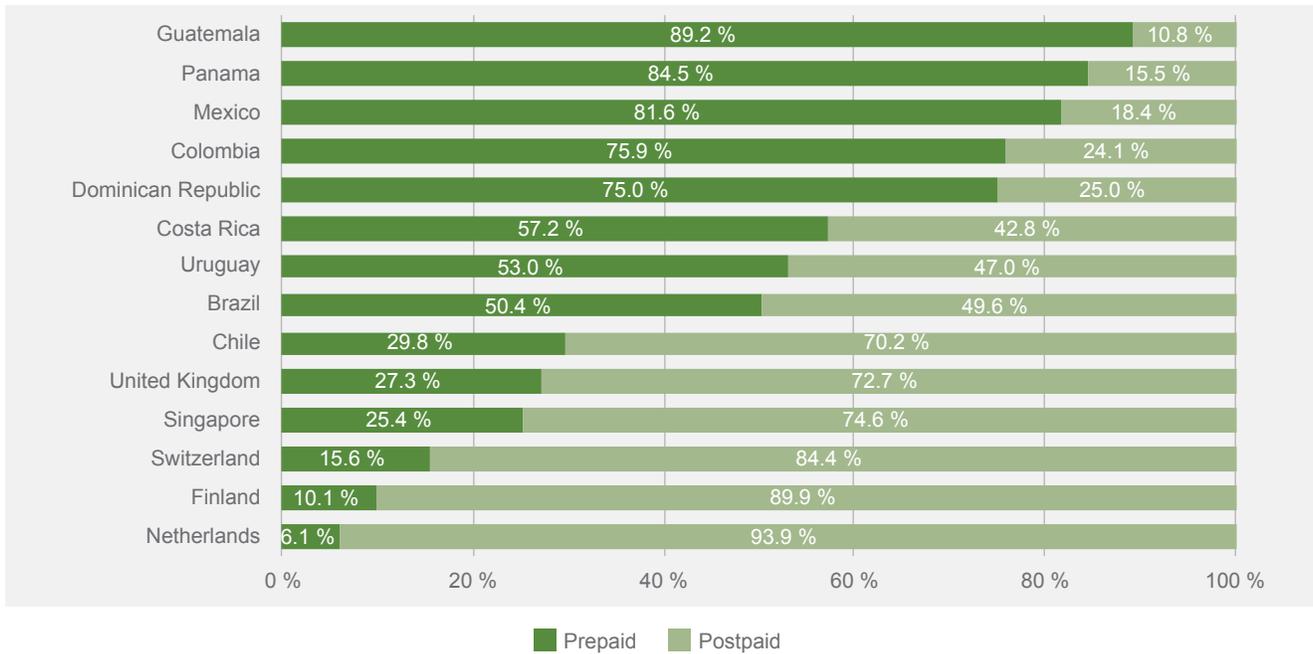
Country	Prepaid	Postpaid
Guatemala	89.2 %	10.8 %
Panama	84.5 %	15.5 %
Mexico	81.6 %	18.4 %
Colombia	75.9 %	24.1 %
Dominican Republic	75.0 %	25.0 %
Costa Rica	57.2 %	42.8 %
Uruguay	53.0 %	47.0 %
Brazil	50.4 %	49.6 %
Chile	29.8 %	70.2 %
United Kingdom	27.3 %	72.7 %
Singapore	25.4 %	74.6 %
Switzerland	15.6 %	84.4 %
Finland	10.1 %	89.9 %
Netherlands	6.1 %	93.9 %

■ Prepaid   ■ Postpaid

Source: SUTEL, General Directorate of Markets, with information from the ITU. Costa Rica, 2023.

GRAPH 295. COSTA RICA: Average income per capita vs percentage of prepaid subscriptions in 2023
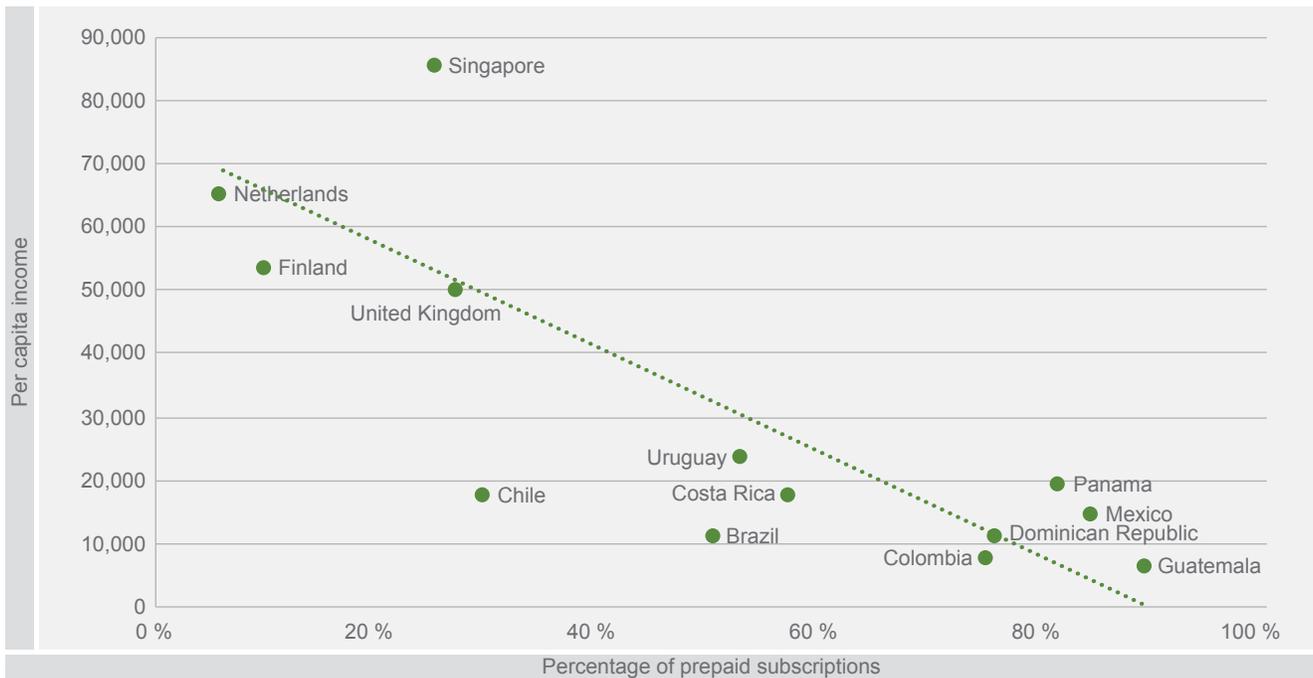
Source: SUTEL, General Directorate of Markets, with information from the World Bank and the ITU. Costa Rica, 2023.

GRAPH 296. Market penetration of fixed Internet services per 100 inhabitants in 2023
(figures in percentage terms)

REST OF THE WORLD

Country	Value
Switzerland	48.8
Korea (Rep.)	46.6
Norway	45.7
Denmark	44.5
Netherlands	43.3
United Kingdom	41.0
Sweden	40.7
USA	38.1
Finland	35.3
Singapore	27.2

#N/D

LATIN AMERICA

Country	Value
Uruguay	32.4
Argentina	25.4
Chile	23.0
Brazil	22.9
Costa Rica	22.5
Mexico	20.5
Panama	18.1
Colombia	17.0
Dominican Republic	11.1
El Salvador	10.7
Peru	10.4
Nicaragua	5.4
Guatemala	5.1
Honduras	4.5
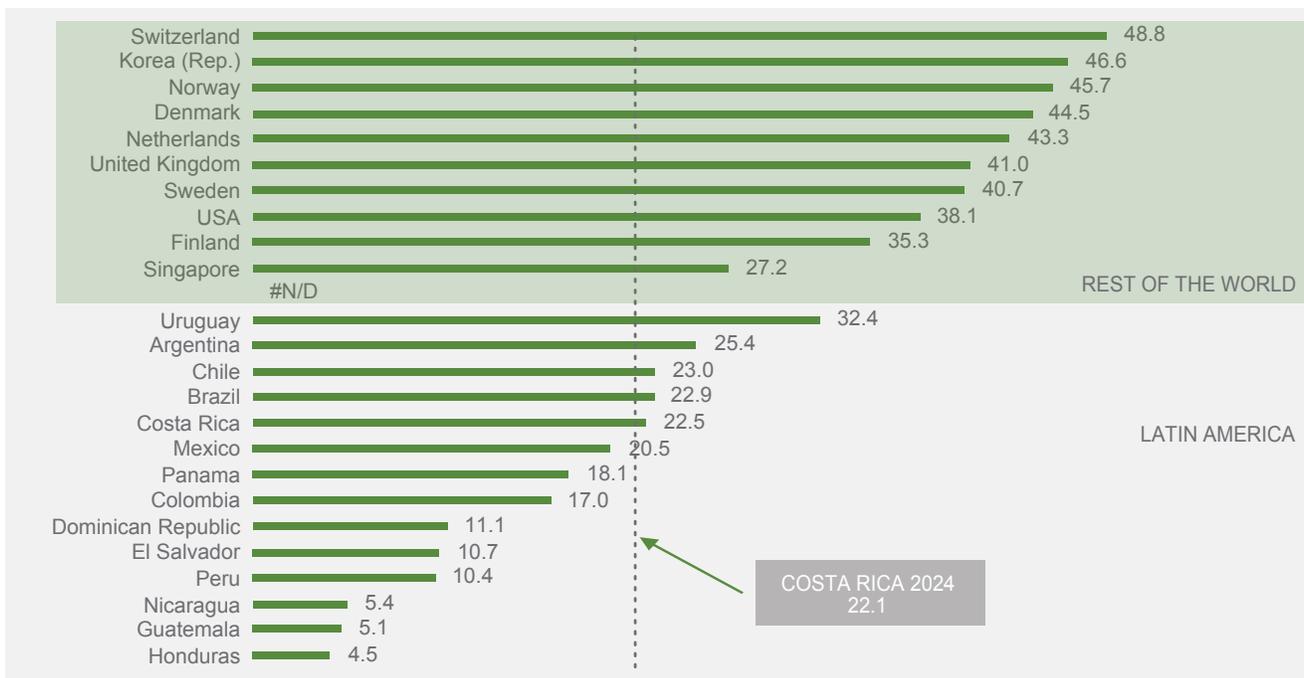
COSTA RICA 2024
22.1

Source: SUTEL, General Directorate of Markets, with information from the ITU. Costa Rica, 2023-2024.

GRAPH 297. Market penetration of mobile Internet services per 100 inhabitants in 2023
(figures in percentage terms)
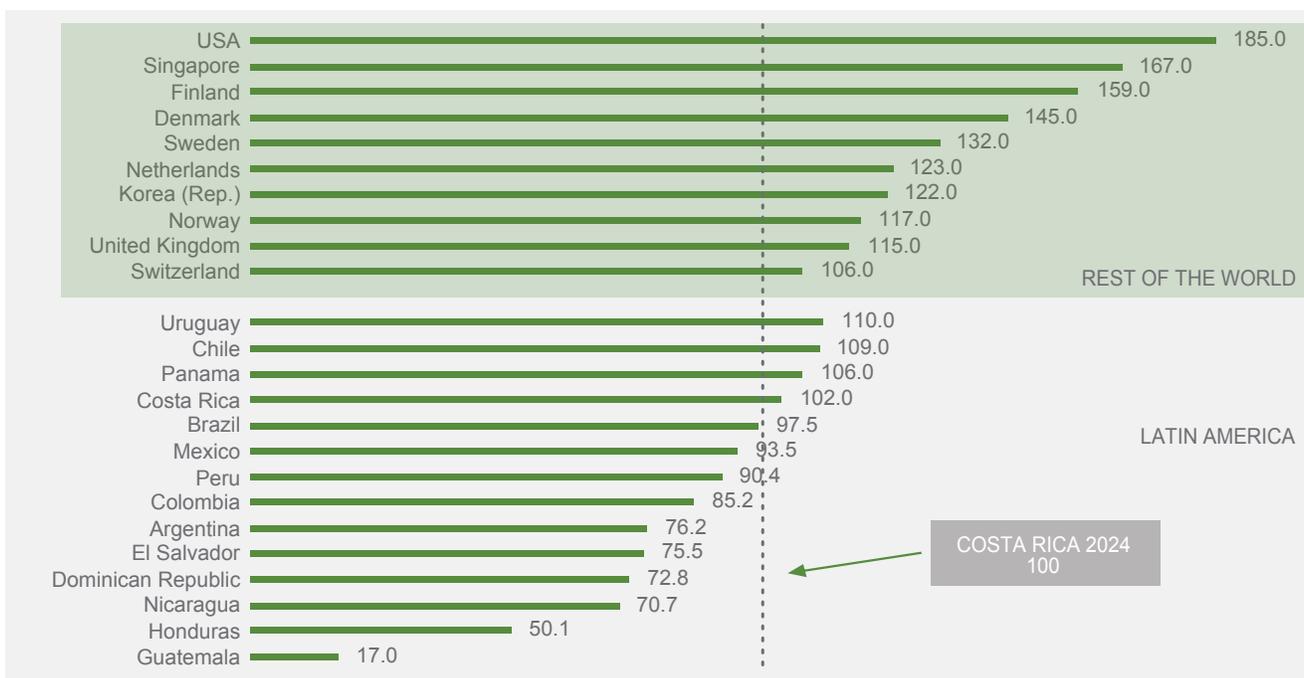
REST OF THE WORLD

Country	Value
USA	185.0
Singapore	167.0
Finland	159.0
Denmark	145.0
Sweden	132.0
Netherlands	123.0
Korea (Rep.)	122.0
Norway	117.0
United Kingdom	115.0
Switzerland	106.0

LATIN AMERICA

Country	Value
Uruguay	110.0
Chile	109.0
Panama	106.0
Costa Rica	102.0
Brazil	97.5
Mexico	93.5
Peru	90.4
Colombia	85.2
Argentina	76.2
El Salvador	75.5
Dominican Republic	72.8
Nicaragua	70.7
Honduras	50.1
Guatemala	17.0

COSTA RICA 2024
100

Source: SUTEL, General Directorate of Markets, with information from the ITU. Costa Rica, 2023-2024.

GRAPH 298. Ratio of total revenue from the telecommunication sector to GDP in 2023

(figures in percentage terms)
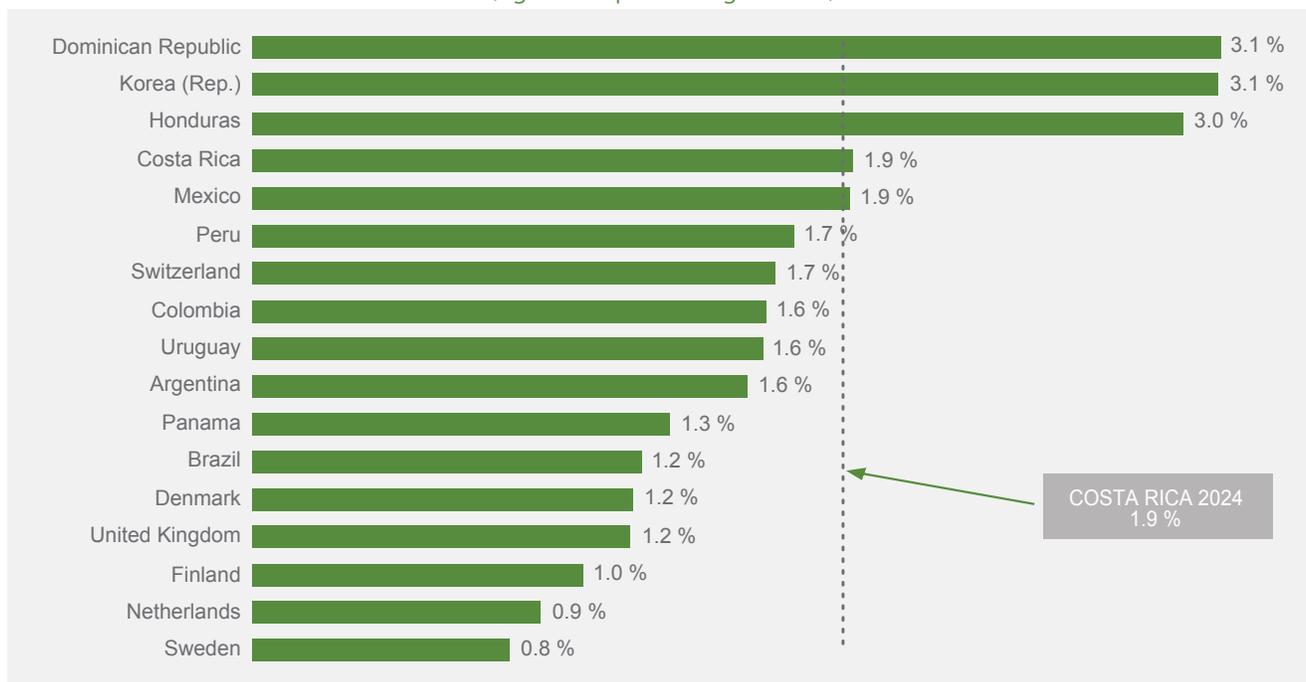
Country	Value
Dominican Republic	3.1 %
Korea (Rep.)	3.1 %
Honduras	3.0 %
Costa Rica	1.9 %
Mexico	1.9 %
Peru	1.7 %
Switzerland	1.7 %
Colombia	1.6 %
Uruguay	1.6 %
Argentina	1.6 %
Panama	1.3 %
Brazil	1.2 %
Denmark	1.2 %
United Kingdom	1.2 %
Finland	1.0 %
Netherlands	0.9 %
Sweden	0.8 %

COSTA RICA 2024
1.9 %

Source: SUTEL, General Directorate of Markets, with information from the ITU. Costa Rica, 2023-2024.

Appendix of statistics

OVERALL EVOLUTION OF THE SECTOR

TABLE 23. COSTA RICA: Total revenue generated by the Telecommunications Sector, 2020 - 2024

(quarterly figures in millions of colones)

Indicator	2020				2021			
	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Millions of colones	184,737	181,004	180,846	182,613	183,678	183,761	181,720	182,198
Rate of variation	1.2 %	-0.7 %	-1.6 %	-2.1 %	-1.0 %	-2.0 %	-0.1 %	1.0 %

Indicator	2022				2023			
	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Millions of colones	182,185	184,356	181,859	182,499	179,819	178,850	180,268	192,009
Rate of variation	0.6 %	0.0 %	-1.1 %	0.3 %	0.6 %	0.1 %	-1.2 %	0.3 %

Indicator	2024				2020	2021	2022	2023	2024
	Q1 2024	Q2 2024	Q3 2024	Q4 2024					
Millions of colones	195,199	200,303	193,589	192,146	729,200	731,357	730,898	730,947	781,237
Rate of variation	0.3 %	0.3 %	0.3 %	0.3 %	-4.7 %	0.3 %	-0.1 %	0.0 %	6.88 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 24. COSTA RICA: Total revenue generated by the Telecommunications Sector per type of service in 2020-2024

(quarterly figures in millions of colones)

	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Plain old telephone service [POTS] & VoIP telephony	12,440	12,162	11,824	11,268	10,439	10,065	9,397	8,887
Mobile telephony (Voice calls & messaging)	54,215	51,180	50,672	49,875	49,667	48,823	47,069	45,901
Internet access (includes mobile Internet access)	106,417	105,551	105,634	108,635	109,964	111,587	112,091	113,581
Dedicated lines	11,664	12,110	12,716	12,835	13,608	13,286	13,162	13,830
Total	**184,737**	**181,004**	**180,846**	**182,613**	**183,678**	**183,761**	**181,720**	**182,198**

	Q1 2022	Q2 2022	Q3 2022	Q4 2022	Q1 2023	Q2 2023	Q3 2023	Q4 2023
Plain old telephone service [POTS] & VoIP telephony	8,563	8,330	7,988	7,654	7,220	5,517	6,707	8,834
Mobile telephony (Voice calls & messaging)	46,345	45,923	45,754	46,136	42,107	44,250	44,648	49,799
Internet access (includes mobile Internet access)	116,098	117,897	117,117	117,178	119,820	119,341	119,237	122,937
Dedicated lines	11,179	12,205	10,999	11,531	10,671	9,743	9,677	10,440
Total	**182,185**	**184,356**	**181,859**	**182,499**	**179,819**	**178,850**	**180,268**	**192,009**

	Q1 2024	Q2 2024	Q3 2024	Q4 2024
Plain old telephone service [POTS] & VoIP telephony	8,619	8,136	7,811	7,655
Mobile telephony (Voice calls & messaging)	44,998	45,451	45,569	46,269
Internet access (includes mobile Internet access)	131,132	137,440	127,013	128,523
Dedicated lines	10,451	9,276	13,196	9,699
Total	**195,199**	**200,303**	**193,589**	**192,146**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 25. COSTA RICA: Total revenue generated by the Telecommunications Sector per type of service in 2020-2024

(yearly figures in millions of colones)

	2020	**2021**	**2022**	**2023**	**2024**
Mobile telephony (only voice calls)	205,942	191,460	184,158	180,803	182,287
Plain old telephone service [POTS] & VoIP telephony	47,695	38,787	32,535	28,278	32,220
Internet access (includes mobile Internet access)	426,237	447,224	468,290	481,334	524,108
Dedicated lines	49,326	53,886	45,915	40,531	42,623
Total	**729,200**	**731,357**	**730,898**	**730,947**	**781,237**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 26. COSTA RICA: Total revenue generated by the Telecommunications Sector per type of service in 2020-2024

(yearly figures in percentage terms)

	2020	**2021**	**2022**	**2023**	**2024**
Mobile telephony (only voice calls)	28 %	26 %	25 %	25 %	23 %
Plain old telephone service [POTS] & VoIP telephony	6 %	5 %	4 %	4 %	4 %
Internet access (includes mobile Internet access)	59 %	61 %	64 %	66 %	68 %
Dedicated lines	7 %	8 %	7 %	5 %	5 %
Total	**100 %**	**100 %**	**100 %**	**100 %**	**100 %**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 27. COSTA RICA: Total revenue generated by the Telecommunications Sector per type of service in 2020-2024
(yearly figures in millions of colones)

	2020	2021	2022	2023	2024
Mobile telephony & mobile Internet access	461,300	446,200	445,973	460,180	489,781
Plain old telephone service [POTS] & VoIP telephony	47,695	38,787	32,535	28,278	32,220
Fixed Internet access	170,879	192,484	206,476	201,957	216,614
Dedicated lines	49,326	53,886	45,915	40,531	42,623
Total	**729,200**	**731,357**	**730,898**	**730,947**	**781,237**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 28. COSTA RICA: Total revenue generated by the Telecommunications Sector per type of service in 2020-2024
(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Mobile telephony & mobile Internet access (mobile network)	63 %	61 %	61 %	63 %	63 %
Plain old telephone service [POTS] & VoIP telephony	7 %	5 %	4 %	4 %	4 %
Fixed Internet access	23 %	27 %	28 %	28 %	28 %
Dedicated lines	7 %	7 %	6 %	5 %	5 %
Total	**100 %**	**100 %**	**100 %**	**100 %**	**100 %**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 29. COSTA RICA: Telecommunications Sector's Workforce, 2020 - 2024

Indicator	2020		2021		2022	
	1st Sem	2nd Sem	1st Sem	2nd Sem	1st Sem	2nd Sem
People	11,138	10,994	10,842	10,798	10,185	10,305
% of variation	19 %	2 %	-3 %	-2 %	-6 %	-5 %

Indicator	2023		2024		2020	2021	2022	2023	2024
	1st Sem	2nd Sem	1st Sem	2nd Sem					
People	10 ,034	9,813	9,762	9,955	10,994	10,798	10,305	9,811	9,955
% of variation	-1 %	-5 %	-3 %	1 %	2 %	-2 %	-5 %	-5 %	1 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 30. COSTA RICA: Percentage of the Telecommunications Sector's workforce in relation to the economically active population, 2020-2024

(yearly figures in percentage terms)

Indicator	2020	2021	2022	2023	2024
Country's total	2,406,533	2,453,173	2,454,023	2,299,897	2,377,438
Telecommunications sector	10,994	10,798	10,305	9,813	9,955
Percentage	0.46 %	0.44 %	0.42 %	0.43 %	0.42 %
% of variation	4 %	-3 %	-5 %	2 %	-2 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 31. COSTA RICA: Percentage of the Telecommunications Sector's workforce in relation to the total population, 2020-2024

(yearly figures in percentage terms)

Indicator	2020	2021	2022	2023	2024
Total population	5,111,238	5,163,038	5,213,362	5,262,225	5,290,037
Telecommunications sector's workforce	10,994	10,798	10,305	9,113	9,955
Percentage	0.22%	0.21%	0.20%	0.19%	0.19%

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 32. COSTA RICA: Telecommunications Sector's Female Workforce, 2020-2024

(half-yearly figures in absolute terms)

Indicator	2020		2021		2022	
	1st Sem	2nd Sem	1st Sem	2nd Sem	1st Sem	2nd Sem
People	3,230	3,279	3,261	3,227	3,012	3,578
% of half-yearly variation	0 %	2 %	0 %	2 %	-7 %	19 %
% of yearly variation	29 %	1 %	1 %	-2 %	-8 %	11 %

Indicator	2023		2024	
	1st Sem	2nd Sem	1st Sem	2nd Sem
People	3,196	3,213	3,841	3,707
% of half-yearly variation	-11 %	1 %	20 %	-3 %
% of yearly variation	6 %	-10 %	20 %	15 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

FIXED TELEPHONY

TABLE 33. COSTA RICA: Plain old telephone service [POTS] & VoIP telephony Subscriptions in 2020-2024
(year-end figures)

Indicator	2020	2021	2022	2023	2024
Total	556,617	500,550	488,582	629,688	608,667
Plain old telephone service [POTS]	504,276	443,684	410,454	362,023	321,465
VoIP	52,341	56,866	78,128	267,665	287,202

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 34. COSTA RICA: Plain old telephone service [POTS] & VoIP telephony Subscriptions in 2023-2024
(figures at the end of each quarter)

Indicator	2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Total	476,039	462,671	467,900	629,688	640,701	632,867	620,629	608,667
Plain old telephone service [POTS]	396,202	385,801	374,731	362,023	354,881	346,041	334,028	321,465
VoIP	79,837	76,870	93,169	267,665	285,820	286,826	286,601	287,202

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 35. COSTA RICA: Number of public payphones in operation, 2020-2024
(year-end figures)

Indicator	2020	2021	2022	2023	2024
Public payphones	3,265	2,905	2,683	2,454	1,790

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 36. COSTA RICA: Fixed telephony traffic generated on-net and off-net (outbound), 2020--2024
(yearly figures in millions of minutes and in percentage of variation)

Indicator	2020	2021	2022	2023	2024
Minutes	1,647	1,353	1,089	805	643
% of variation		-17.8 %	-19.5 %	-26.1 %	-20.1 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 37. COSTA RICA: Plain old telephone service [POTS] & VoIP telephony traffic generated on-net and off-net (outbound) in 2023-2024

(quarterly figures in millions of minutes and in percentage of variation)

Indicator	2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Minutes	218	204	196	187	171	163	159	151
% of variation		-6.6 %	-3.9 %	-4.5 %	-8.6 %	-4.8 %	-2.4 %	-5.0 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 38. COSTA RICA: VoIP telephony traffic generated on-net and off-net (outbound) in 2020-2024

(yearly figures in millions of minutes and in percentage of variation)

Indicator	2020	2021	2022	2023	2024
Minutes	183	177	199	239	440
% of variation		-3.3 %	12.1 %	20.3 %	84.2 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 39. COSTA RICA: VoIP telephony traffic generated on-net and off-net (outbound) in 2023-2024

(quarterly figures in millions of minutes and in percentage of variation)

Indicator	2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Minutes	40	36	38	125	114	110	110	106
% of variation		-10.2 %	6.6 %	228.2 %	-8.8 %	-3.5 %	-0.4 %	-3.5 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 40. COSTA RICA: Total revenue from fixed telephony services in 2020-2024

(annual figures in millions of colones and percentage change)

Indicator	2020	2021	2022	2023	2024
Amount	46,884	37,982	31,791	28,986	31,397
% of variation		-19.0 %	-16.3 %	-8.8 %	8.3 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 41. COSTA RICA: Total revenue from VoIP telephony services in 2023-2024

(annual figures in millions of colones and percentage change)

Indicator	2020	2021	2022	2023	2024
Amount	6,261	6,205	6,070	7,888	14,519
% of variation		-0.9 %	-2.2 %	29.9 %	84.1 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 42. COSTA RICA: Total revenue from plain old telephone service [POTS] & VoIP telephony in 2023-2024

(quarterly figures in millions of colones and in percentage of variation)

Indicator	2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Amount	7,052	6,765	6,538	8,631	8,419	7,940	7,612	7,426
% of variation		-4.1 %	-3.4 %	32.0 %	-2.5 %	-5.7 %	-4.1 %	-2.5 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 43. COSTA RICA: Revenue from VoIP telephony services in 2023-2024

(quarterly figures in millions of colones and in percentage of variation)

Indicator	2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Amount	1,397	1,417	1,346	3,728	3,915	3,617	3,489	3,499
% of variation		1.4 %	-5.0 %	176.9 %	5.0 %	-7.6 %	-3.5 %	0.3 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 44. COSTA RICA: Average revenue per subscriber from plain old telephone service [POTS] & VoIP telephony in 2020-2024

(yearly figures in thousands of colones and in percentage of variation)

Year	Average revenue			Percentage of variation		
	POTS	VoIP	Tel. Fixed	POTS	VoIP	Tel. Fixed
2020	80,556	119,624	84,230			
2021	71,692	109,112	75,943	-11 %	-9 %	-10 %
2022	62,663	77,352	65,021	-13 %	-29 %	-14 %
2023	58, 277	29,487	46,044	-7 %	-62 %	-29 %
2024	52,502	50,555	51,583	-10 %	71 %	12 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 45. COSTA RICA: Average revenue per minute from plain old telephone service [POTS] & VoIP telephony in 2020-2024

(figures in colones and in percentage of variation)

Year	Average revenue			Percentage of variation		
	VoIP	POTS	Tel. Fixed	VoIP	POTS	Tel. Fixed
2020	34	28	28			
2021	35	27	28	2 %	-3 %	-1 %
2022	31	29	29	-13 %	7 %	4 %
2023	33	37	36	8 %	29 %	23 %
2024	33	83	49	0 %	123 %	36 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

MOBILE TELECOMMUNICATIONS

TABLE 46. COSTA RICA: Total mobile telephony subscribers per operator in 2020-2024

(figures at the end of the IV quarter in thousands of subscriptions and in percentage of variation)

TOTAL	2020	2021	2022	2023	2024
	Q4	Q4	Q4	Q4	Q4
ICE	3,084	3,022	2,558	2,531	2,597
% of variation	-2 %	-2 %	-15 %	-1 %	3 %
Claro	1,524	1,496	1,666	1,538	1,584
% of variation	-6 %	-2 %	11 %	-8 %	3 %
Liberty	2,558	2,609	2,714	2,748	2,798
% of variation	4 %	2 %	4 %	1 %	2 %
Fullmóvil	7				
% of variation	0 %				
Tuyo Móvil					
% of variation					
TOTAL	**7,173**	**7,127**	**6,938**	**6,817**	**6,978**
% of variation	**-1 %**	**-1 %**	**-3 %**	**-2 %**	**2 %**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 47. COSTA RICA: Total mobile telephony subscribers per payment plan, 2020-2024

(figures at the end of the IV quarter in thousands of subscriptions and in percentage of variation)

TOTAL	2020	2021	2022	2023	2024
	Q4	Q4	Q4	Q4	Q4
Prepaid	4,666	4,432	3,935	3,633	3,532
% of variation	-3 %	-5 %	-11 %	-8 %	-3 %
Postpaid	2,506	2,695	3,002	3,184	3,446
% of variation	4 %	8 %	11 %	6 %	8 %
TOTAL	**7,173**	**7,127**	**6,938**	**6,817**	**6,978**
% of variation	**-1 %**	**-1 %**	**-3 %**	**-2 %**	**2 %**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 48. COSTA RICA: Mobile telephony service penetration per 100 inhabitants in 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Mobile penetration	140.3 %	138.0 %	133.1 %	129.6 %	131.9 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 49. COSTA RICA: Share of mobile telephony subscriptions by operator per payment plan in 2020-2024

(yearly figures in percentage terms)

	2020	2021	2022	2023	2024
Prepaid					
ICE	38 %	39 %	31 %	33 %	36 %
Claro	21 %	19 %	25 %	22 %	21 %
Liberty	41 %	42 %	44 %	45 %	43 %
Postpaid					
ICE	53 %	48 %	44 %	42 %	39 %
Claro	21 %	24 %	23 %	23 %	24 %
Liberty	25 %	28 %	33 %	35 %	37 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 50. COSTA RICA: Total revenue generated by mobile telecommunications per category in 2020-2024

(yearly figures in millions of colones)

	2020	2021	2022	2023	2024
Mobile telecommunications	**461,300**	**446,199**	**445,973**	**460,180**	**489,781**
Mobile telephony	**204,662**	**189,790**	**181,327**	**177,930**	**179,691**
Voice calls	198,835	184,121	175,526	174,598	176,342
SMS / MMS	5,827	5,669	5,801	3,332	3,348
Outbound roaming	**1,281**	**1,670**	**2,831**	**2,874**	**2,596**
Voice calls	596	510	557	479	411
SMS / MMS	212	226	353	252	145
Roaming data	472	934	1,921	2,143	2,041
Mobile data	**255,358**	**254,740**	**261,815**	**279,377**	**307,494**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 51. COSTA RICA: Total revenue generated by mobile telecommunications per payment plan in 2020-2024

(yearly figures in millions of colones)

	2020	2021	2022	2023	2024
TOTAL					
Prepaid	104,363	90,694	81,378	72,887	66,782
Postpaid	356,937	355,505	364,596	387,294	422,999

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 52. COSTA RICA: Average revenue per minute (ARPM)[1] by mobile telephony service in 2020-2024
(yearly figures in millions of colones)

	2020	2021	2022	2023	2024
Voice call revenue	198,835,062,005	184,120,767,037	175,526,496,271	174,597,620,724	176,342,497,308
Total traffic	5,911,248,866	5,274,994,020	4,524,529,003	3,947,375,934	3,398,359,654
ARPM	34	35	39	44	52

1 Includes domestic and international voice call traffic and revenue only.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 53. COSTA RICA: Total traffic and share by payment plan per year[1], 2020 - 2024
(figures in millions of minutes and in percentage terms)

	2020	2021	2022	2023	2024
Total traffic	5,911	5,275	4,525	3,947	3,398
Prepaid	1,606	1,297	1,006	812	652
Postpaid	4,305	3,978	3,519	3,136	2,746
Prepaid	27 %	25 %	22 %	21 %	19 %
Postpaid	73 %	75 %	78 %	79 %	81 %

1 Includes domestic and international voice call traffic and revenue only.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 54. COSTA RICA: Relative distribution of mobile telephony service traffic by destination with relation to total traffic, 2020 - 2024
(yearly figures in millions of minutes and in percentage terms)

	2020	2021	2022	2023	2024
Total traffic	5,911	5,275	4,525	3,947	3,398
Mobile-mobile (On-net)	51 %	51 %	50 %	49 %	47 %
Mobile-mobile (Off-net)	28 %	28 %	28 %	28 %	28 %
Mobile-Fixed	18 %	18 %	19 %	20 %	22 %
Mobile-International	4 %	4 %	3 %	3 %	3 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 55. COSTA RICA: Subscriptions, revenue and total traffic from mobile Internet access, 2020 - 2024

(quarterly figures)

	2020				2021			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Subscriptions	4,642,113	4,706,623	4,614,579	4,736,699	4,779,523	4,718,159	4,755,211	4,904,938
% of variation	-0.2 %	1.4 %	-2 %	2.6 %	0.9 %	-1.3 %	0.8 %	3.1 %
Revenue (millions of colones)	65,635.9	63,130.8	62,811.3	63,779.6	63,601.3	63,341.0	63,506.6	64,291.0
% of variation	-1.2 %	-3.8 %	-0.5 %	1.5 %	-0.3 %	-0.4 %	0.3 %	1.2 %
Traffic (TB)	51,001.5	57,144.7	55,324.9	59,338.4	62,078.6	64,966.5	69,724.0	72,387.8
% of variation	12.5 %	12 %	-3.2 %	7.3 %	4.6 %	4.7 %	7.3 %	3.8 %

	2022				2023			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Subscriptions	4,912,784	4,860,425	4,872,212	5,001,945	5,009,066	5,020,809	5,077,340	5,183,454
% of variation	0.2 %	-1.1 %	0.2 %	2.7 %	0.1 %	0.2 %	1.1 %	2.1 %
Revenue (millions of colones)	65,371.9	65,374.4	65,392.8	65,675.7	70,016.8	68,292.1	69,316.6	71,751.4
% of variation	1.7 %	. %	. %	0.4 %	6.6 %	-2.5 %	1.5 %	3.5 %
Traffic (TB)	75,799.7	78,816.5	85,509.5	92,535.1	91,918.0	100,358.0	110,351.0	113,815.0
% of variation	4.7 %	4 %	8.5 %	8.2 %	-0.7 %	9.2 %	10 %	3.1 %

	2024			
	Q1	Q2	Q3	Q4
Subscriptions	5 227 360	5,155,833	5,213,337	5,315,598
% of variation	0.8 %	-1.4 %	1.1 %	2 %
Revenue (millions of colones)	78,015.9	83,853.1	71,982.2	73,642.7
% of variation	8.7 %	7.5 %	-14.2 %	2.3 %
Traffic (TB)	120,822	119,809	118,289	118,479
% of variation	6.2 %	-0.8 %	-1.3 %	0.2 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

DATA TRANSFER

TABLE 56. COSTA RICA: Subscriptions, revenue and total traffic from fixed Internet access in 2020-2024
(quarterly figures)

	2020				2021			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Subscriptions	926,362	950,278	969,498	992,725	1,020,653	1,024,865	1,044,185	1,058,767
% of variation	2.4 %	2.6 %	2 %	2.4 %	2.81 %	41 %	1.89 %	1.4 %
Revenue (millions of colones)	40,781	42,420	42,823	44,855	46,363	48,246	48,585	49,290
% of variation	1.8 %	4 %	1 %	4.7 %	3.4 %	4.1 %	0.7 %	1.5 %
Traffic (TB)	419,858	565,280	622,508	642,241	689,451	754,105	810,584	815,212
% of variation	38.0 %	34.6 %	10.1 %	3.2 %	7.4 %	9.4 %	7.5 %	0.6 %

	2022				2023			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Subscriptions	1,074,944	1,080,825	1,103,529	1,105,670	1,124,333	1,134,411	1,128,977	1,149,933
% of variation	1.5 %	0.5 %	2.1 %	0.2 %	1.7 %	0.9 %	-0.5 %	1.9 %
Revenue (millions of colones)	50,726	52,523	51,724	51,502	49,812	51,057	49,928	51,193
% of variation	2.9 %	3.5 %	-1.5 %	-0.4 %	-3.3 %	2.5 %	-2.2 %	2.5 %
Traffic (TB)	836,155	867,440	979,746	1,044,891	1,052,032	1,182,304	1,196,946	1,168,515
% of variation	2.6 %	3.7 %	12.9 %	6.6 %	0.7 %	12.4 %	1.2 %	-2.4 %

	2024			
	Q1	Q2	Q3	Q4
Subscriptions	1,165,442	1,174,214	1,164,637	1,194,638
% of variation	1.3 %	0.8 %	-0.8 %	2.6 %
Revenue (millions of colones)	53,118	53,584	55,041	54,869
% of variation	3.8 %	0.9 %	2.7 %	-0.3 %
Traffic (TB)	1,243,869	1,402,302	1,684,416	1,673,971
% of variation	6.4 %	12.7 %	20.1 %	-0.6 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 57. COSTA RICA: Revenue and subscriptions from dedicated lines in 2020-2024
(quarterly figures)

	2020				2021			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Subscriptions	22,881	22,590	22,839	23,665	20,807	20,481	18,686	18,625
% of variation		-1.27 %	1.1 %	3.62 %	-12.08 %	-1.57 %	-8.76 %	-0.33 %
Revenue (millions of colones)	11,664	12,278	13,439	12,834	13,608	13,299	13,164	13,830
% of variation		5.26 %	9.46 %	-4.5 %	6.03 %	-2.28 %	-1.01 %	5.06 %

	2022				2023			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Subscriptions	17,764	17,120	18,009	18,140	17,644	17,540	19,825	19,454
% of variation	-4.62 %	-3.63 %	5.19 %	0.73 %	-2.73 %	-0.59 %	13.03 %	-1.87 %
Revenue (millions of colones)	11,179	12,120	10,999	11,744	10,783	9,824	9,705	10,468
% of variation	-19.16 %	8.41 %	-9.25 %	6.78 %	-8.19 %	-8.89 %	-1.21 %	7.87 %

	2024			
	Q1	Q2	Q3	Q4
Subscriptions	19,613	20,508	27,242	20,089
% of variation	0.82 %	4.56 %	32.84 %	-26.26 %
Revenue (millions of colones)	10,451	9,276	13,196	9,699
% of variation	-0.17 %	-11.24 %	42.26 %	-26.5 %

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

SUBSCRIPTION TELEVISION

TABLE 58. COSTA RICA: Total TV subscriptions by type of technology per quarter in 2020-2024
(figures at the end of each quarter)

Technology	2020				2021			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Cable television	565,779	555,727	550,758	548,052	536,266	527,937	515,454	506,169
Satellite television	245,831	232,702	227,821	224,465	216,871	206,242	201,313	195,722
IPTV	61,627	74,061	84,656	94,076	107,653	120,266	133,505	147,059
Terrestrial television broadcast by multipoint distribution	249	253	0	0	0	0	0	0
Total	**873,486**	**862,743**	**863,235**	**866,593**	**860,790**	**854,445**	**850,272**	**848,950**

Technology	2022				2023			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Cable television	472,783	474,311	467,602	461,208	458,358	444,438	429,703	426,641
Satellite television	190,184	197,258	178,557	177,666	180,481	162,590	157,489	152,759
IPTV	170,737	178,622	185,733	192,705	199,933	214,948	223,992	239,664
Terrestrial television broadcast by multipoint distribution	0	0	0	0	0	0	0	0
Total	**833,704**	**850,191**	**831,892**	**831,579**	**838,772**	**821,976**	**811,184**	**819,064**

Technology	2024			
	Q1	Q2	Q3	Q4
Cable television	412,960	405,524	385,740	384,780
Satellite television	145,786	139,382	131,117	124,617
IPTV	247,280	258,552	271,178	289,431
Terrestrial television broadcast by multipoint distribution	0	0	0	0
Total	**806,026**	**803,458**	**788,035**	**798,828**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 59. COSTA RICA: Total revenue from TV subscriptions by type of technology per quarter in 2020-2024

(quarterly figures in millions of colones)

Technology	2020				2021			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Cable television	27,506	27,388	26,885	26,946	25,455	25,921	25,555	25,036
Satellite television	10,062	10,068	10,071	10,227	10,111	9,617	9,733	10,003
IPTV	2,972	3,416	3,988	4,442	5,537	5,532	5,954	6,270
Terrestrial television broadcast by multipoint distribution	29	20	12	0	0	0	0	0
Total	**40,569**	**40,894**	**40,955**	**41,614**	**41,102**	**41,070**	**41,241**	**41,309**

Technology	2022				2023			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Cable television	23,515	22,977	22,427	25,488	25,478	25,349	25,038	24,970
Satellite television	8,930	8,652	8,427	7,758	8,574	6,865	6,538	6,371
IPTV	7,988	8,483	8,815	9,059	9,198	9,350	9,485	9,663
Terrestrial television broadcast by multipoint distribution	0	0	0	0	0	0	0	0
Total	**40,432**	**40,111**	**39,668**	**42,305**	**43,250**	**41,564**	**41,061**	**41,004**

Technology	2024			
	Q1	Q2	Q3	Q4
Cable television	24,670	24,102	23,177	22,517
Satellite television	6,087	5,824	5,469	5,128
IPTV	9,816	9,751	9,738	9,813
Terrestrial television broadcast by multipoint distribution	0	0	0	0
Total	**40,573**	**39,677**	**38,385**	**37,458**

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

COMMERCIAL OFFERS AND PRICES

TABLE 60. COSTA RICA: Characteristics of the prepaid mobile telecommunications packages offered in December 2023

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Kölbi	Paquete SMS Básico	₡100	N/A	N/A	N/A	N/A	N/A	N/A	50	N/A	N/A
Kölbi	Paquete SMS Día Plus	₡200	N/A	N/A	N/A	N/A	N/A	N/A	100	N/A	N/A
Liberty	Paquete LDI Full Nicaragua 7 días	₡1,000	Minutes	8	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI Movistar Nicaragua 7 días	₡1,000	Minutes	15	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI Europa	₡1,000	Minutes	25	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI América	₡1,000	Minutes	15	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI USA/Canadá	₡1,000	Minutes	18	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Plan Prepago Captación PC	₡500	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	"Recharge your plan with ¢1,000-¢1,999: Get twice as much for voice calls and SMS messages sent to Movistar CR; valid for 4 days. Recharge your plan with ¢2,000-¢2,999: Get twice as much for voice calls in all other networks in CR. Includes unlimited WhatsApp, Facebook, Instagram, Twitter and Waze; valid for 6 days. Recharge your plan with ¢3,000 or more: Get twice as much for voice calls and navigation in all other networks in CR, TIGO, NICARAGUA, USA & CANADA. Includes unlimited WhatsApp, Facebook, Instagram, Twitter and Waze; valid for 6 days."
Liberty	Plan Prepago Portabilidad PO	₡500	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	"Recharge your plan with ¢1,000-¢1,999: Double for calls and SMS to Movistar CR + free WhatsApp (20MB) valid for 3 days. Recharges from ¢2,000 and above: Triple for calls and SMS to all CR operators + free WhatsApp (300MB) valid for 6 days, plus Facebook, Instagram, Twitter, Waze (50MB) valid for 6 days"

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Liberty	Plan Libre Prepago	₡5,900	Minutes, Internet	70	N/A	140	70	N/A	N/A	4	"Recharge your plan with ₡2,000 or more: Double for calls and texts to Movistar CR Includes unlimited social media (WhatsApp, Twitter, Waze).
Liberty	Paquete Video Prepago	₡3,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	25	N/A
Liberty	Paquete Semana Prepago	₡2,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	N/A
Liberty	Paquete 4 Días Prepago	₡1,300	Internet	N/A	N/A	N/A	N/A	N/A	N/A	600 Mb	N/A
Liberty	Paquete 2 Días Prepago	₡600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	400 Mb	N/A
Liberty	Paquete Diario Prepago	₡375	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Liberty	Paquete Ilimitado Nocturno	₡600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	Unlimited data at night, from 23:00 to 07:00; up to 150 MB of free data during the day.
Liberty	Paquete Básico Prepago	₡200	Internet	N/A	N/A	N/A	N/A	N/A	N/A	30 Mb	N/A
Liberty	Súper Bono 200MB	₡600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	200 Mb	N/A
Liberty	Súper Bono 600MB	₡1,300	Internet	N/A	N/A	N/A	N/A	N/A	N/A	600 Mb	N/A
Liberty	Súper Bono LDI 20 Min	₡1,100	Minutes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Súper Bono LDI 8 Min	₡550	Minutes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete CONECTADOS Prepago	₡2,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Claro	Paquetes de Internet América y Estados Unidos 50 MB	₡10,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50 Mb	N/A
Claro	Paquetes de Internet América y Estados Unidos 150 MB	₡25,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Claro	Paquetes de Internet América y Estados Unidos 300 MB	₡46,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	N/A
Claro	Paquetes de Internet *Roaming* Prepago resto del mundo 50 MB	₡20,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50 Mb	N/A

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Claro	Paquetes de Internet *Roaming* Prepago resto del mundo 150 MB	₡56,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Claro	Paquete *roaming* Estados Unidos 15 sms	₡1,350	N/A	N/A	N/A	N/A	15	N/A	N/A	N/A	N/A
Claro	Paquete *roaming* Estados Unidos 25 sms	₡2,000	N/A	N/A	N/A	N/A	25	N/A	N/A	N/A	N/A
Claro	Paquete *roaming* Estados Unidos 50 sms	₡3,500	N/A	N/A	N/A	N/A	50	N/A	N/A	N/A	N/A
Claro	Paquete *roaming* América 15 sms	₡1,350	N/A	N/A	N/A	N/A	15	N/A	N/A	N/A	N/A
Claro	Paquete *roaming* América 25 sms	₡2,000	N/A	N/A	N/A	N/A	25	N/A	N/A	N/A	N/A
Claro	Paquete *roaming* América 50 sms	₡3,500	N/A	N/A	N/A	N/A	50	N/A	N/A	N/A	N/A
Kölbi	*Roaming* América Internet (Prepago)	N/A	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Kölbi	Servicio *Roaming* Datos por Región (Prepago)	N/A	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete Música Prepago	₡2,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	Unlimited Mb	Unlimited bonus data on music apps
Liberty	Súper Recarga 2000	₡2,000	Minutes, Internet	15	N/A	N/A	N/A	N/A	N/A	1	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty	Súper Recarga 1000	₡1,000	Minutes, Internet	10	N/A	N/A	N/A	N/A	N/A	300 Mb	Includes unlimited WhatsApp
Liberty	Súper Bono SR 2000	₡2,000	Minutes, Internet	15	N/A	N/A	N/A	N/A	N/A	1	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty	Súper Bono SR 1000	₡1,000	Minutes, Internet	10	N/A	N/A	N/A	N/A	N/A	300 Mb	Includes unlimited WhatsApp
Liberty	Paquete Día Prepago	₡375	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Liberty	Súper Bono 150MB	₡375	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Liberty	Súper Recarga Plus 2500	₡2,500	Minutes, Internet	20	N/A	N/A	N/A	N/A	N/A	1.2	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty	Súper Recarga Plus 4500	₡4,500	Minutes, Internet	45	N/A	N/A	N/A	N/A	N/A	2	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Claro	Turbonett quincena	₡9,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	15	"-Unlimited data plan with 15GB of capacity. Once the gigabytes have been used up, the customer will browse at a minimum functional speed of 384kbps. -Available for prepaid data service. The customer must have a Turbonnet profile to use this plan. -Not available to pure prepaid or hybrid customers."
Claro	Turbonett semana	₡4,900	Internet	N/A	N/A	N/A	N/A	N/A	N/A	7	"-Unlimited data plan with 7GB of capacity. Once the gigabytes have been used up, the customer will browse at a minimum functional speed of 384kbps. -Available for prepaid data service. The customer must have a Turbonnet profile to use this plan. -Not available to pure prepaid or hybrid customers."
Claro	Turbonett día	₡750	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	"-Unlimited data plan with 1GB of capacity. Once the gigabytes have been used up, the customer will browse at a minimum functional speed of 384kbps. -Available for prepaid data service. The customer must have a Turbonnet profile to use this plan. -Not available to pure prepaid or hybrid customers."
Claro	Turbonett mes	₡17,500	N/A	N/A	N/A	N/A	N/A	N/A	N/A	30	"-Unlimited data plan with 30GB of capacity. Once the gigabytes have been used up, the customer will browse at a minimum functional speed of 384kbps. -Available for prepaid data service. The customer must have a Turbonnet profile to use this plan. -Not available to pure prepaid or hybrid customers."
Claro	M@s Hablo América 3	₡1,500	Minutes	N/A	N/A	30	N/A	N/A	N/A	N/A	"-30 minutes for calls to Claro Central America-Panama and all operators in the US and Canada Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans"

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Claro	M@s Navego 3GB	₡4,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	3	"-WhatsApp is unlimited* "The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit. -WhatsApp will be free throughout the package's validity period."
Claro	"M@s Navego 1GB" [More Navigation 1GB]	₡2,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	"-WhatsApp is unlimited* "The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit. -WhatsApp will be free throughout the package's validity period."
Claro	"M@s Navego 400MB" [More Navigation 400MB]	₡1,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	400 Mb	"-WhatsApp is unlimited* "The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit. -WhatsApp will be free throughout the package"s validity period."
Claro	M@s Navego 300MB	₡600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	"-WhatsApp is unlimited* "The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit. -WhatsApp will be free throughout the package's validity period."
Claro	M@s Navego 150MB	₡300	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	"-WhatsApp is unlimited* "The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit. -WhatsApp will be free throughout the package's validity period."
Claro	NOCHES ILIMITADAS	₡400	Internet	N/A	N/A	N/A	N/A	N/A	N/A	Unlimited Mb	"-Unlimited browsing from 10 p.m. to 6 a.m. -The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit."
Claro	AMIGO FAVORITO	₡250	Minutes	N/A	N/A	Unlimited	N/A	N/A	N/A	N/A	"Free unlimited minutes to a specific Claro number in Costa Rica. Available for Prepaid Plans."
Claro	Ilimitado CLARO	₡500	Minutes	N/A	N/A	Unlimited	N/A	N/A	N/A	N/A	"-Free unlimited minutes to all Claro numbers in Costa Rica -Available for prepaid plans"
Claro	M@s Hablo América 2	₡1,000	Minutes	N/A	10	N/A	N/A	N/A	N/A	N/A	"-10 minutes for calls to all operators in Central America, Panama, the US, and Canada Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans"

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Claro	M@s Hablo America1	₡550	Minutes	N/A	N/A	10	N/A	N/A	N/A	N/A	"-10 minutes for calls to Claro Central America-Panama and all operators in the US and Canada Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans"
Claro	M@s Hablo NICARAGUA	₡400	Minutes	N/A	N/A	10	N/A	N/A	N/A	N/A	"10 minutes for calls to Claro numbers in Nicaragua Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans"
Claro	M@s Hablo Costa Rica25	₡700	Minutes	25	N/A	N/A	N/A	N/A	N/A	N/A	"The free minutes only apply to calls in Costa Rica. Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans."
Claro	M@s Hablo Costa Rica60	₡1,500	Minutes	60	N/A	N/A	N/A	N/A	N/A	N/A	"The free minutes only apply to calls in Costa Rica. Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans."
Claro	M@s Mensajeo100	₡250	N/A	N/A	N/A	N/A	100	N/A	N/A	N/A	"-100 messages to all operators in Costa Rica. -Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans."
Claro	M@s Mensajeo200	₡300	N/A	N/A	N/A	N/A	200	N/A	N/A	N/A	"-200 messages to all operators in Costa Rica. Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans"
Claro	AMÉRICA + USA ROAMING 150MB	₡25,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Claro	AMÉRICA + USA ROAMING 50MB	₡10,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50 Mb	N/A
Claro	AMÉRICA + USA ROAMING 300MB	₡46,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	N/A
Claro	MUNDIAL ROAMING 50MB	₡20,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50 Mb	N/A
Claro	MUNDIAL ROAMING 150MB	₡56,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Claro	AMÉRICA ROAMING 50MN	₡23,000	Minutes	50	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	AMÉRICA ROAMING 25MN	₡16,000	Minutes	25	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	AMÉRICA ROAMING 15MN	₡9,000	Minutes	15	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Claro	AMÉRICA *ROAMING* 10MN	₡6,500	Minutes	10	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 50MN	₡15,000	Minutes	50	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 25MN	₡10,500	Minutes	25	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 15MN	₡6,000	Minutes	15	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 10MN	₡4,500	Minutes	10	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	AMÉRICA *ROAMING* 50SMS	₡3,500	N/A	N/A	N/A	N/A	50	N/A	N/A	N/A	N/A
Claro	AMÉRICA *ROAMING* 25SMS	₡2,000	N/A	N/A	N/A	N/A	25	N/A	N/A	N/A	N/A
Claro	AMÉRICA *ROAMING* 15SMS	₡1,350	N/A	N/A	N/A	N/A	15	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 50SMS	₡3,500	N/A	N/A	N/A	N/A	50	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 25SMS	₡2,000	N/A	N/A	N/A	N/A	25	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 15SMS	₡1,350	N/A	N/A	N/A	N/A	15	N/A	N/A	N/A	N/A
Claro	"M@s Navego 30MB" [More Navigation 30MB]	₡100	Internet	N/A	N/A	N/A	N/A	N/A	N/A	30 Mb	This Internet package covers access in CR, Central America and Panama, if the Without Borders Prepaid Plan is purchased.
Claro	Paquete M@s7	₡2,000	Minutes, Internet	20	N/A	200	50	N/A	N/A	1	"WhatsApp is unlimited* The Internet capacity for social media is 500 MB, including Facebook, Instagram, Pinterest, and Waze."
Claro	Paquete M@s 3	₡1,000	Minutes, Internet	10	N/A	50	20	N/A	N/A	300 Mb	"WhatsApp is unlimited* The Internet capacity for social media is 500 MB, including Facebook, Instagram, Pinterest, and Waze."
Claro	Paquete M@s10	₡3,000	Minutes, Internet	30	N/A	200	100	N/A	N/A	2	"WhatsApp is unlimited* The Internet capacity for social media is 500 MB, including Facebook, Instagram, Pinterest, and Waze."

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Claro	Paquete M@s 15	₡4,500	Minutes, Internet	45	N/A	200	200	N/A	N/A	3	"WhatsApp is unlimited* The Internet capacity for social media is 700 MB, including Facebook, Instagram, Pinterest, and Waze."
Claro	"Paquete M@s 30" [More 30 Package]	₡10,000	Minutes, Internet	85	N/A	200	300	N/A	N/A	5	"WhatsApp is unlimited* The Internet capacity for social media is 700 MB, including Facebook, Instagram, Pinterest, and Waze."
Kölbi	Paquete Voz Internacional Panamá #1	₡900	Minutes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	*Valid for 7 days. The total price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%).
Kölbi	Paquete Voz Internacional Nicaragua #1	₡3,100	Minutes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	*Valid for 7 days. The total price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%).
Kölbi	Paquete Voz Internacional USA #1	₡1,200	Minutes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	*Valid for 7 days. The total price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%).
Kölbi	"Plan Dominio Prepago 1" [Prepaid Domain Plan 1]	₡5,040	Minutes, Internet	35	N/A	N/A	30	N/A	N/A	2	The total monthly price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%).
Kölbi	Plan Dominio Prepago 2	₡8,065	Minutes, Internet	50	N/A	N/A	30	N/A	N/A	4	The total monthly price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%).
Kölbi	Plan Dominio Prepago 3	₡12,095	Minutes, Internet	100	N/A	N/A	30	N/A	N/A	5	The total monthly price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%).
Kölbi	Paquete Internet Prepago En Todas 1	₡200	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50 Mb	1- These packages will renew automatically. 2- Includes up to 100 MB of WhatsApp, Instagram & Facebook data usage. 3- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Paquete Internet Prepago En Todas 3	₡600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	200 Mb	1- These packages will renew automatically. 2- Includes up to 100 MB of WhatsApp, Instagram & Facebook data usage. 3- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Paquete Internet Prepago En Todas Plus 5	₡1,300	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	1- These packages will renew automatically. 2- Includes up to 200 MB of WhatsApp, Instagram, Facebook, Snapchat, Pinterest and Twitter data usage. 3- Reach speeds of up to 50 Mbps in the 4.5G network.

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Kölbi	Paquete Internet Prepago En Todas Plus 10	₡2,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	500 Mb	1- These packages will renew automatically. 2- Includes up to 400 MB of WhatsApp, Instagram, Facebook, Snapchat, Pinterest and Twitter data usage. 3- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Paquete Internet Prepago 1 GIGA	₡2,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	These packages will renew automatically. Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Paquete Internet Prepago 2 GIGAS	₡4,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	2	These packages will renew automatically. Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Paquete Internet Prepago Entretenimiento - Música	₡4,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1- These packages will renew automatically. 2- 30 days of Unlimited Internet on Apps included in this package. 3- Available to customers with pure prepaid, prepaid "Dominio" and "Dominio k" plans.
Kölbi	Paquete Internet Prepago Entretenimiento - Juego	₡1,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1- These packages will renew automatically. 2- 7 days of Unlimited Internet on Apps included in this package. 3- Available to customers with pure prepaid, prepaid "Dominio" and "Dominio k" plans.
Kölbi	Paquete Internet Prepago Entretenimiento - Social	₡1,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1- These packages will renew automatically. 2- 7 days of Unlimited Internet on Apps included in this package. 3- Available to customers with pure prepaid, prepaid "Dominio" and "Dominio k" plans.. 4- Voice calls, video calls and VoIP calls, Videochats, and chatbots in the following applications: Facebook, Instagram, and WhatsApp.
Kölbi	Paquete Internet Prepago Entretenimiento - Video	₡4,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1- These packages will renew automatically. 2- Up to 10 GB for 30 days in Apps included in this package. 3- Available to customers with pure prepaid, prepaid "Dominio" and "Dominio k" plans.
Kölbi	Paquete Internet Prepago Ilimitado - Hora	₡600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1. 60 minutes of unlimited free Internet. 2- Activate through any of the following: a. from kölbi App; b. by sending an SMS to 8888 with the relevant activation word (according to package); or From the k Store, dial *888 (option 3).

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Kölbi	Paquete Internet Prepago Ilimitado - Día	₡1,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1. 24 hours of unlimited free Internet. 2- Activate through any of the following: a. from kölbi App; b. by sending an SMS to 8888 with the relevant activation word (according to package); or From the k Store, dial *888 (option 3).
Kölbi	Paquete Internet Prepago Ilimitado - Noche	₡600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1. Unlimited free Internet from 9 pm to 6 am. 2- Activate through any of the following: a. from kölbi App; b. by sending an SMS to 8888 with the relevant activation word (according to package); or From the k Store, dial *888 (option 3).

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 61. COSTA RICA: Characteristics of the prepaid mobile telecommunications packages offered in December 2024

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Kölbi	Paquete SMS Básico	₡100	N/A	N/A	N/A	N/A	N/A	N/A	50	N/A	N/A
Kölbi	Paquete SMS Día Plus	₡200	N/A	N/A	N/A	N/A	N/A	N/A	100	N/A	N/A
Liberty	Paquete LDI *Full* Nicaragua 7dias	₡1,000	Minutes	8	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI Europa	₡1,000	Minutes	25	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI América	₡1,000	Minutes	15	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI USA/Canadá	₡1,000	Minutes	18	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Liberty	Plan Prepago Captación PC	₡500	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	"Recharge your plan with ¢1,000-¢1,999: Get twice as much for voice calls and SMS messages sent to Movistar CR; valid for 4 days. Recharge your plan with ¢2,000-¢2,999: Get twice as much for voice calls in all other networks in CR. Includes unlimited WhatsApp, Facebook, Instagram, Twitter and Waze; valid for 6 days. Recharge your plan with ¢3,000 or more: Get twice as much for voice calls and navigation in all other networks in CR, TIGO, NICARAGUA, USA & CANADA. Includes unlimited WhatsApp, Facebook, Instagram, Twitter and Waze; valid for 6 days."
Liberty	Plan Libre Prepago	₡5,900	Minutes, Internet	70	N/A	140	70	N/A	N/A	4	"Recharge your plan with ¢2,000 or more: Double for calls and texts to Movistar CR Includes unlimited social media (WhatsApp, Twitter, Waze)."
Liberty	Paquete Video Prepago	₡3,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	25	N/A
Liberty	Paquete Semana Prepago	₡2,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	N/A
Liberty	Paquete 4 Días Prepago	₡1,300	Internet	N/A	N/A	N/A	N/A	N/A	N/A	600 Mb	N/A
Liberty	Paquete Ilimitado Nocturno	₡600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	Unlimited data at night, from 23:00 to 07:00; up to 150 MB of free data during the day.
Liberty	Paquete Básico Prepago	₡200	Internet	N/A	N/A	N/A	N/A	N/A	N/A	30 Mb	N/A
Liberty	Súper Bono 200MB	₡600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	200 Mb	N/A
Liberty	Súper Bono 600MB	₡1,300	Internet	N/A	N/A	N/A	N/A	N/A	N/A	600 Mb	N/A
Liberty	Súper Bono LDI 20 Min	₡1,100	Minutes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Súper Bono LDI 8 Min	₡550	Minutes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete CONECTADOS Prepago	₡2,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Claro	Paquetes de Internet América y Estados Unidos 50 MB	₡10,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50 Mb	www.claro.cr

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Claro	Paquetes de Internet América y Estados Unidos 150 MB	₡25,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Claro	Paquetes de Internet América y Estados Unidos 300 MB	₡46,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	N/A
Claro	Paquetes de Internet *Roaming* Prepago resto del mundo 50 MB	₡20,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50 Mb	N/A
Claro	Paquetes de Internet *Roaming* Prepago resto del mundo 150 MB	₡56,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Claro	Paquete *roaming* Estados Unidos 15 sms	₡1,350	Internet	N/A	N/A	N/A	15	N/A	N/A	N/A	N/A
Claro	Paquete *roaming* Estados Unidos 25 sms	₡2,000	Internet	N/A	N/A	N/A	25	N/A	N/A	N/A	N/A
Claro	Paquete *roaming* Estados Unidos 50 sms	₡3,500	Internet	N/A	N/A	N/A	50	N/A	N/A	N/A	N/A
Claro	Paquete *roaming* América 15 sms	₡1,350	Internet	N/A	N/A	N/A	15	N/A	N/A	N/A	N/A
Claro	Paquete *roaming* América 25 sms	₡2,000	Internet	N/A	N/A	N/A	25	N/A	N/A	N/A	N/A
Claro	Paquete *roaming* América 50 sms	₡3,500	Internet	N/A	N/A	N/A	50	N/A	N/A	N/A	N/A
Kölbi	*Roaming* América Internet (Prepago)	N/A	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Kölbi	Servicio *Roaming* Datos por Región (Prepago)	N/A	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete Música Prepago	₡2,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	Unlimited Mb	Unlimited bonus data on music apps
Liberty	Súper Recarga 2000	₡2,000	Minutes, Internet	15	N/A	N/A	N/A	N/A	N/A	1	Includes unlimited RRSS (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty	Súper Recarga 1000	₡1,000	Minutes, Internet	10	N/A	N/A	N/A	N/A	N/A	300 Mb	Includes unlimited WhatsApp
Liberty	Súper Bono SR 2000	₡2,000	Minutes, Internet	15	N/A	N/A	N/A	N/A	N/A	1	Includes unlimited RRSS (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty	Súper Bono SR 1000	₡1,000	Minutes, Internet	10	N/A	N/A	N/A	N/A	N/A	300 Mb	Includes unlimited WhatsApp

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Liberty	Paquete Día Prepago	₡375	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	
Liberty	Súper Recarga Plus 2500	₡2,500	Minutes, Internet	20	N/A	N/A	N/A	N/A	N/A	1.2	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty	Súper Recarga Plus 4500	₡4,500	Minutes, Internet	45	N/A	N/A	N/A	N/A	N/A	2	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Claro	Turbonett quincena	₡9,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	15	"-Unlimited data plan with 15GB of capacity. Once the gigabytes have been used up, the customer will browse at a minimum functional speed of 384kbps. -Available for prepaid data service. The customer must have a Turbonnet profile to use this plan. -Not available to pure prepaid or hybrid customers."
Claro	Turbonett semana	₡4,900	Internet	N/A	N/A	N/A	N/A	N/A	N/A	7	"-Unlimited data plan with 7GB of capacity. Once the gigabytes have been used up, the customer will browse at a minimum functional speed of 384kbps. -Available for prepaid data service. The customer must have a Turbonnet profile to use this plan. -Not available to pure prepaid or hybrid customers."
Claro	Turbonett día	₡750	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	"-Unlimited data plan with 1GB of capacity. Once the gigabytes have been used up, the customer will browse at a minimum functional speed of 384kbps. -Available for prepaid data service. The customer must have a Turbonnet profile to use this plan. -Not available to pure prepaid or hybrid customers."
Claro	Turbonett mes	₡17,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	30	"-Unlimited data plan with 30GB of capacity. Once the gigabytes have been used up, the customer will browse at a minimum functional speed of 384kbps. -Available for prepaid data service. The customer must have a Turbonnet profile to use this plan. -Not available to pure prepaid or hybrid customers."

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Claro	M@s Hablo America3	₡1,500	Minutes	N/A	N/A	30	N/A	N/A	N/A		"-30 minutes for calls to Claro Central America-Panama and all operators in the US and Canada Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans"
Claro	M@s Navego 3GB	₡4,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	3	"-WhatsApp is unlimited* "The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit. -WhatsApp will be free throughout the package's validity period."
Claro	"M@s Navego 1GB" [More Navigation 1GB]	₡2,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	"-WhatsApp is unlimited* "The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit. -WhatsApp will be free throughout the package's validity period."
Claro	"M@s Navego 400MB" [More Navigation 400MB]	₡1,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	400 Mb	"-WhatsApp is unlimited* "The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit. -WhatsApp will be free throughout the package"s validity period."
Claro	M@s Navego 300MB	₡600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	"-WhatsApp is unlimited* "The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit. -WhatsApp will be free throughout the package's validity period."
Claro	M@s Navego 150MB	₡300	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	"-WhatsApp is unlimited* "The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit. -WhatsApp will be free throughout the package's validity period."
Claro	NOCHES ILIMITADAS	₡400	Internet	N/A	N/A	N/A	N/A	N/A	N/A	Unlimited Mb	"-Unlimited browsing from 10 p.m. to 6 a.m. -The Internet package works in Costa Rica, Central America, and Panama with the Sin Fronteras Prepaid benefit."
Claro	AMIGO FA-VORITO	₡250	Minutes	N/A	N/A	Unlimited	N/A	N/A	N/A	N/A	"Free unlimited minutes to a specific Claro number in Costa Rica. Available for Prepaid Plans."

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Claro	IlimitadoCLA-RO	₡500	Minutes	N/A	N/A	Unlimited	N/A	N/A	N/A	N/A	"-Free unlimited minutes to all Claro numbers in Costa Rica -Available for prepaid plans"
Claro	M@s Hablo America2	₡1,000	Minutes	N/A	10	N/A	N/A	N/A	N/A	N/A	"-10 minutes for calls to all operators in Central America, Panama, the US, and Canada Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans"
Claro	M@s Hablo America1	₡550	Minutes	N/A	N/A	10	N/A	N/A	N/A	N/A	"-10 minutes for calls to Claro Central America-Panama and all operators in the US and Canada Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans"
Claro	M@s Hablo NICARAGUA	₡400	Minutes	N/A	N/A	10	N/A	N/A	N/A	N/A	"10 minutes for calls to Claro numbers in Nicaragua Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans"
Claro	M@s Hablo Costa Rica25	₡700	Minutes	25	N/A	N/A	N/A	N/A	N/A	N/A	"The free minutes only apply to calls in Costa Rica. Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans."
Claro	M@s Hablo Costa Rica60	₡1,500	Minutes	60	N/A	N/A	N/A	N/A	N/A	N/A	"The free minutes only apply to calls in Costa Rica. Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans."
Claro	M@s Mensajeo100	₡250	N/A	N/A	N/A	N/A	100	N/A	N/A	N/A	"-100 messages to all operators in Costa Rica. -Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans."
Claro	M@s Mensajeo200	₡300	N/A	N/A	N/A	N/A	200	N/A	N/A	N/A	"-200 messages to all operators in Costa Rica. Available for Prepaid Plans & "Cuenta Control" [Control Account] Plans"
Claro	AMÉRICA + USA ROAMING 150MB	₡25,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Claro	AMÉRICA + USA ROAMING 50MB	₡10,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50 Mb	N/A
Claro	AMÉRICA + USA ROAMING 300MB	₡46,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	N/A
Claro	MUNDIAL ROAMING 50MB	₡20,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50 Mb	N/A
Claro	MUNDIAL ROAMING 150MB	₡56,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Claro	AMÉRICA *ROAMING* 50MN	₡23,000	Minutes	50	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	AMÉRICA *ROAMING* 25MN	₡16,000	Minutes	25	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	AMÉRICA *ROAMING* 15MN	₡9,000	Minutes	15	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	AMÉRICA *ROAMING* 10MN	₡6,500	Minutes	10	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 50MN	₡15,000	Minutes	50	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 25MN	₡10,500	Minutes	25	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 15MN	₡6,000	Minutes	15	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 10MN	₡4,500	Minutes	10	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	AMÉRICA *ROAMING* 50SMS	₡3,500	N/A	N/A	N/A	N/A	50	N/A	N/A	N/A	N/A
Claro	AMÉRICA *ROAMING* 25SMS	₡2,000	N/A	N/A	N/A	N/A	25	N/A	N/A	N/A	N/A
Claro	AMÉRICA *ROAMING* 15SMS	₡1,350	N/A	N/A	N/A	N/A	15	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 50SMS	₡3,500	N/A	N/A	N/A	N/A	50	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 25SMS	₡2,000	N/A	N/A	N/A	N/A	25	N/A	N/A	N/A	N/A
Claro	NORTEAMER-ICA *ROAMING* 15SMS	₡1,350	N/A	N/A	N/A	N/A	15	N/A	N/A	N/A	N/A
Kölbi	Paquete Internet Prepago Ilimitado - Día	₡1,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1. 24 hours of unlimited free Internet. 2- Activate through any of the following: a. from kölbi App; b. by sending an SMS to 8888 with the relevant activation word (according to package); or From the k Store, dial *888 (option 3).
Claro	Paquete M@s 15+	₡6,000	Minutes, Internet	70	N/A	200	200	N/A	N/A	4	"WhatsApp is unlimited* The Internet capacity for social media is 700 MB, including Facebook, Instagram, Pinterest, and Waze."

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Claro	Paquete M@s 15+	₡6,000	Minutes, Internet	70	N/A	200	200	200	200	4	"WhatsApp is unlimited* The Internet capacity for social media is 700 MB, including Facebook, Instagram, Pinterest, and Waze 5GB Claro sports."
Claro	M@s Navego 150MB	₡300	Internet	Unlimited	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	Paquete M@s 15	₡4,500	Minutes, Internet	45	45	200	200	200	200	3	"WhatsApp is unlimited* The Internet capacity for social media is 700 MB, including Facebook, Instagram, Pinterest, and Waze."
Claro	Paquete M@s10	₡3,000	Minutes, Internet	30	30	200	100	100	100	2	"WhatsApp is unlimited* The Internet capacity for social media is 500 MB, including Facebook, Instagram, Pinterest, and Waze."
Claro	"Paquete M@s 30" [More 30 Package]	₡10,000	Minutes, Internet	85	85	200	300	300	300	5	"WhatsApp is unlimited* The Internet capacity for social media is 700 MB, including Facebook, Instagram, Pinterest, and Waze."
Claro	Paquete M@s 3	₡1,000	Minutes, Internet	10	10	50	20	20	20	300 Mb	"WhatsApp is unlimited* The Internet capacity for social media is 500 MB, including Facebook, Instagram, Pinterest, and Waze."
Claro	Paquete M@s7	₡2,000	Minutes, Internet	20	20	200	50	50	50	1	"WhatsApp is unlimited* The Internet capacity for social media is 500 MB, including Facebook, Instagram, Pinterest, and Waze."
Claro	"M@s Navego 30MB" [More Navigation 30MB]	₡100	Internet	N/A	N/A	N/A	N/A	N/A	N/A	30 Mb	This Internet package covers access in CR, Central America and Panama, if the Without Borders Prepaid Plan is purchased.
Claro	Paquete M@s 15+	₡6,000	Minutes, Internet	70	70	200	200	200	200	4	"WhatsApp is unlimited* The Internet capacity for social media is 700 MB, including Facebook, Instagram, Pinterest, and Waze."
Kölbi	Paquete Internet Prepago En Todas Plus 5	₡1,320	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	1- These packages will renew automatically. 2- Includes up to 200 MB of WhatsApp, Instagram, Facebook, Snapchat, Pinterest and Twitter data usage. 3- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Paquete Internet Prepago 1 GIGA	₡2,539	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	These packages will renew automatically. Reach speeds of up to 50 Mbps in the 4.5G network.

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Kölbi	Paquete Internet Prepago 2 GIGAS	₡4,062	Internet	N/A	N/A	N/A	N/A	N/A	N/A	2	These packages will renew automatically. Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Paquete Internet Prepago En Todas 1	₡203	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50 Mb	1- These packages will renew automatically. 2- Includes up to 100 MB of WhatsApp, Instagram & Facebook data usage. 3- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Paquete Internet Prepago En Todas 3	₡609	Internet	N/A	N/A	N/A	N/A	N/A	N/A	200 Mb	1- These packages will renew automatically. 2- Includes up to 100 MB of WhatsApp, Instagram & Facebook data usage. 3- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Paquete Internet Prepago En Todas Plus 10	₡2,539	Internet	N/A	N/A	N/A	N/A	N/A	N/A	500 Mb	1- These packages will renew automatically. 2- Includes up to 400 MB of WhatsApp, Instagram, Facebook, Snapchat, Pinterest and Twitter data usage. 3- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Paquete Internet Prepago Entretenimiento - Juego	₡1,015	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1- These packages will renew automatically. 2- 7 days of Unlimited Internet on Apps included in this package. 3- Available to customers with pure prepaid, prepaid "Dominio" and "Dominio k" plans. 4- Unlimited free Internet capacity.
Kölbi	Paquete Internet Prepago Entretenimiento - Música	₡4,062	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1- These packages will renew automatically. 2- 30 days of Unlimited Internet on Apps included in this package. 3- Available to customers with pure prepaid, prepaid "Dominio" and "Dominio k" plans. 4- Unlimited free Internet capacity.
Kölbi	Paquete Internet Prepago Entretenimiento - Social	₡1,523	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1- These packages will renew automatically. 2- 7 days of Unlimited Internet on Apps included in this package. 3- Available to customers with pure prepaid, prepaid "Dominio" and "Dominio k" plans.. 4- Voice calls, video calls and VoIP calls, Videochats, and chatbots in the following applications: Facebook, Instagram, and WhatsApp. 5- Unlimited free Internet capacity.

Operator	Name	Price	Included services	Minutes to all operators	Minutes to another operator	Minutes to the same operator	SMS to all operators	SMS to another operator	SMS to the same operator	Total download capacity (Gigabytes)	Other additional services
Kölbi	Paquete Internet Prepago Entretenimiento - Video	₡4,062	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	1- These packages will renew automatically. 2- Up to 10 GB for 30 days in Apps included in this package. 3- Available to customers with pure prepaid, prepaid "Dominio" and "Dominio k" plans.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 62. COSTA RICA: Characteristics of the postpaid mobile telecommunications packages offered in December 2023

Operator	Name of Telephone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Claro	Internet Móvil PRO	₡9,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Claro	Internet Móvil FULL	₡12,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Claro	Internet Móvil GOLD	₡14,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Claro	Internet Móvil PLATINO	₡16,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Claro	Internet Móvil DIAMOND	₡18,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Liberty	Plan WiFi Móvil Plan 4G 10GB	₡13,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	24-month permanence agreements include a free mifi device, with no down payment.
Liberty	Plan WiFi Móvil Plan 4G 20GB	₡18,750	Internet	N/A	N/A	N/A	N/A	N/A	N/A	20	12-month permanence agreements include a subsidized mifi device.
Liberty	Paquete LDI Full Nicaragua	₡1,000	Minutes	N/A	8	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI Movistar Nicaragua	₡1,000	Minutes	N/A	15	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI Europa	₡1,000	Minutes	N/A	25	15	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI América	₡1,000	Minutes	N/A	N/A	18	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI USA -Canadá	₡1,000	Minutes	N/A	N/A	60	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI Estados Unidos y Canadá	₡2,000	Minutes	N/A	N/A	50	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI Movistar Nicaragua Mes	₡2,500	Minutes	N/A	N/A	150	N/A	N/A	N/A	N/A	N/A

Operator	Name of Tele-phone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to an-other operator	Minutes to all op-erators	SMS to the same operator	SMS to another operator	SMS to all oper-ators	Total download capacity (Giga-bytes)	Observations
Liberty / Kölbi	Plan Pospago LTE PRO @1 CT	₡10,700	Minutes, Internet	300	N/A	200	300	N/A	150	10	Includes unlimited data usage on social media apps (WhatsApp, Twitter, Waze)
Liberty	Plan Pospago LTE PRO @2 CT	₡16,000	Minutes, Internet	Unlimited	N/A	300	Unlimited	N/A	200	15	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty / Kölbi	Plan Pospago LTE PRO @3 CT	₡22,000	Minutes, Internet	Unlimited	N/A	1000	Unlimited	N/A	300	19	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty	Plan Pospago LTE PRO @5 CT	₡33,200	Minutes, Internet	Unlimited	N/A	Unlimited	Unlimited	N/A	1000	29	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty / Kölbi	Plan Pospago LTE PRO @6 CT	₡42,200	Minutes, Internet	Unlimited	N/A	150	Unlimited	N/A	Unlimited	Unlimited	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty / Kölbi	Plan Pospago LTE PRO @1 ST	₡10,500	Minutes, Internet	300	N/A	200	300	N/A	150	8	Includes 5 GB of free data in social media apps (WhatsApp, Twitter, Waze)
Liberty	Plan Pospago LTE PRO @2 ST	₡15,500	Minutes, Internet	Unlimited	N/A	300	Unlimited	N/A	200	10	Includes 5 GB of free data in social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Kölbi / Liberty	Plan Pospago LTE PRO @3 ST	₡21,500	Minutes, Internet	Unlimited	N/A	600	Unlimited	N/A	300	14	Includes 5 GB of free data in social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Claro / Liberty / Claro	Plan Pospago LTE PRO @4 ST	₡26,500	Minutes, Internet	Unlimited	N/A	1000	Unlimited	N/A	600	16	Includes 5 GB of free data in social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty	Plan Pospago LTE PRO @5 ST	₡32,500	Minutes, Internet	Unlimited	N/A	1500	Unlimited	N/A	1000	22	Includes 5 GB of free data in social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty	Plan Pospago LTE PRO @6 ST	₡41,500	Minutes, Internet	Unlimited	N/A	600	Unlimited	N/A	1500	30	Includes 5 GB of free data in social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Liberty	Plan Pospago LTE PRO @4 CT	₡26,500	Minutes, Internet	Unlimited	N/A	N/A	Unlimited	N/A	600	22	Includes 30GB of free data in social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze)
Claro	Paquetes de Internet Améri-ca y Estados Unidos 150 MB	₡4,800	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150	Terms and conditions in www.claro.cr
Claro	Paquetes de Internet *Roaming* Centroamérica 300 MB	₡8,700	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300	Terms and conditions in www.claro.cr

Operator	Name of Tele-phone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to an-other operator	Minutes to all op-erators	SMS to the same operator	SMS to another operator	SMS to all oper-ators	Total download capacity (Giga-bytes)	Observations
Claro	Paquetes de Internet *Roaming* Centroamérica 500 MB	₡12,900	Internet	N/A	N/A	N/A	N/A	N/A	N/A	500	N/A
Claro	Paquetes de Internet *Roaming* Centroamérica 1 GB	₡16,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	N/A
Claro	Paquetes de Internet *Roaming* América 150 MB	₡22,600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150	N/A
Claro	Paquetes de Internet *Roaming* América 300 MB	₡42,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300	N/A
Claro	Paquetes de Internet América y Estados Unidos 500 MB	₡62,400	Internet	N/A	N/A	N/A	N/A	N/A	N/A	500	N/A
Claro	Paquetes de Internet *Roaming* América 1 GB	₡99,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	N/A
Claro	Paquetes de Internet *Roaming* 150 MB	₡46,750	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150	N/A
Claro	Paquetes de Internet *Roaming* 300 MB	₡82,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300	N/A
Claro	Paquetes de Internet *Roaming* 500 MB	₡121,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	500	N/A
Claro	Paquetes de Internet *Roaming* 1 GB	₡187,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	N/A
Claro	Paquetes de datos adicionales 1 GB	₡2,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	N/A
Claro	Paquetes de datos adicionales 3 GB	₡4,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	3	N/A
Claro	Paquetes de datos adicionales 5 GB	₡7,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	5	N/A
Claro	Paquetes de datos adicionales 12 GB	₡14,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	12	N/A

Operator	Name of Telephone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Claro	Paquete Europa sin fronteras vigencia 1 día	₡6,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	Paquete Europa sin fronteras vigencia 3 días	₡18,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	Paquete Europa sin fronteras vigencia 5 días	₡30,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Kölbi	*Roaming* América Internet (Pospago)	N/A	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Kölbi	Servicio *Roaming* Datos por Región (Pospago)	N/A	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	Paquete de *Roaming* Japón	₡31,200	Internet	N/A	N/A	150	N/A	N/A	N/A	512	N/A
Liberty	Plan Pospago LTE PRO @1 Portabilidad	₡10,700	Minutes, Internet	300	N/A	200	300	N/A	150	10	Includes unlimited data usage on social media apps (WhatsApp, Twitter, Waze) Accrue Gigas
Liberty	Plan Pospago LTE PRO @2 Portabilidad	₡16,000	Minutes, Internet	Unlimited	N/A	300	Unlimited	N/A	200	15	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze) Accrue Gigas Transfer Gigas.
Liberty	Plan Pospago LTE PRO @3 Portabilidad	₡22,000	Minutes, Internet	Unlimited	N/A	600	Unlimited	N/A	300	19	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze) Accrue Gigas Transfer Gigas.
Liberty	Plan Pospago LTE PRO @4 Portabilidad	₡27,200	Minutes, Internet	Unlimited	N/A	1000	Unlimited	N/A	600	24	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze) Accrue Gigas Transfer Gigas.
Liberty	Plan Pospago LTE PRO @5 Portabilidad	₡33,200	Minutes, Internet	Unlimited	N/A	Unlimited	Unlimited	N/A	1000	29	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze) Accrue Gigas Transfer Gigas.
Liberty	Plan Pospago LTE PRO @6 Portabilidad	₡42,200	Minutes, Internet	Unlimited	N/A	150	Unlimited	N/A	Unlimited	Unlimited	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze) Transfer Gigas.
Liberty	Plan Pospago LTE PRO @1 Sin Celular	₡10,700	Minutes, Internet	300	N/A	200	300	N/A	150	8	Includes unlimited data usage on social media apps (WhatsApp, Twitter, Waze) Accrue Gigas

Operator	Name of Telephone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Liberty	Plan Pospago LTE PRO @2 Sin Celular	₡16,000	Minutes, Internet	Unlimited	N/A	300	Unlimited	N/A	200	11	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze) Accrue Gigas Transfer Gigas.
Liberty	Plan Pospago LTE PRO @3 Sin Celular	₡22,000	Minutes, Internet	Unlimited	N/A	600	Unlimited	N/A	300	15	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze) Accrue Gigas Transfer Gigas.
Liberty	Plan Pospago LTE PRO @4 Sin Celular	₡27,200	Minutes, Internet	Unlimited	N/A	1000	Unlimited	N/A	600	18	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze) Accrue Gigas Transfer Gigas.
Liberty	Plan Pospago LTE PRO @5 Sin Celular	₡33,200	Minutes, Internet	Unlimited	N/A	Unlimited	Unlimited	N/A	1000	23	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze) Accrue Gigas Transfer Gigas.
Liberty	Plan Pospago LTE PRO @6 Sin Celular	₡42,200	Minutes, Internet	Unlimited	N/A	N/A	Unlimited	N/A	Unlimited	Unlimited	Includes unlimited data usage on social media apps (WhatsApp, Facebook, Instagram, Twitter, Waze) Transfer Gigas.
Liberty	Plan WiFi Móvil Plan 10GB LTE PRO Básico	₡15,500	Internet	N/A	N/A	150	N/A	N/A	N/A	10	Only available for use with MIFI devices.
Kölbi	Plan Pospago Ultra k1	₡10,865	Minutes, Internet	N/A	N/A	N/A	N/A	N/A	150	10	1- Unused GIGABYTES may be carried over for local Internet consumption the following month. 2- These phone plans may be marketed with the financing options currently available. 3- Unlimited capacity for WhatsApp, Instagram, Facebook, Waze, and X apps.
Kölbi	Plan Pospago Ultra k2	₡15,228	Minutes, Internet	Unlimited	300	N/A	Unlimited	300	N/A	15	Customers will have unlimited usage for the following apps: WhatsApp, Instagram, Waze, and X. In addition, they can select two categories of apps at no additional cost, which are detailed below: 1- SOCIAL (unlimited usage, includes TikTok, Pinterest, LinkedIn). 2- VIDEO (up to 5 GB, includes Netflix, YouTube, Disney+). 3- PRODUCTIVITY (up to 5 GB, includes Zoom, Teams, Web Ex). 4- MUSIC (unlimited free data; includes: Spotify, Sound Cloud, Kölbi Music).

Operator	Name of Tele-phone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to an-other operator	Minutes to all op-erators	SMS to the same operator	SMS to another operator	SMS to all oper-ators	Total download capacity (Giga-bytes)	Observations
Kölbi	Plan Pospago Ultra k3	₡20,304	Minutes, Internet	Unlimited	500	N/A	Unlimited	500	N/A	20	Users get unlimited free data in the following apps: WhatsApp, Instagram, Waze, and X. In addition, they can select two categories of apps at no additional cost, which are detailed below: 1- SOCIAL (unlimited free data; includes: Tiktok, Pinterest, LinkedIn). 2- VIDEO (up to 5 GB of free data usage; includes: Netflix, Youtube, Disney +). 3- PRODUCTIVITY (up to 5 GB of free data usage; includes: Zoom, Teams, Web Ex). 4- MUSIC (unlimited free data; includes: Spotify, Sound Cloud, Kölbi Music).
Kölbi	Plan Pospago Ultra k4	₡28,427	Minutes, Internet	Unlimited	700	N/A	Unlimited	700	N/A	28	Users get unlimited free data in the following apps: WhatsApp, Instagram, Waze, and X. In addition, they can select two categories of apps at no additional cost, which are detailed below: 1- SOCIAL (unlimited free data; includes: Tiktok, Pinterest, LinkedIn). 2- VIDEO (up to 5 GB of free data usage; includes: Netflix, Youtube, Disney +). 3- PRODUCTIVITY (up to 5 GB of free data usage; includes: Zoom, Teams, Web Ex). 4- MUSIC (unlimited free data; includes: Spotify, Sound Cloud, Kölbi Music).
Kölbi	Plan Pospago Ultra k5	₡42,645	Minutes, Internet	Unlimited	1000	N/A	Unlimited	1000	N/A	N/A	Users get unlimited free data in the following apps: WhatsApp, Instagram, Waze, and X. In addition, they can select two categories of apps at no additional cost, which are detailed below: 1- SOCIAL (unlimited free data; includes: Tiktok, Pinterest, LinkedIn). 2- VIDEO (up to 5 GB of free data usage; includes: Netflix, Youtube, Disney +). 3- PRODUCTIVITY (up to 5 GB of free data usage; includes: Zoom, Teams, Web Ex). 4- MUSIC (unlimited free data; includes: Spotify, Sound Cloud, Kölbi Music).
Kölbi	Plan Datos 1	₡13,100	Internet	N/A	N/A	N/A	Unlimited	Unlimited	Unlimited	14	1- If you need to increase your download capacity, you can switch to a higher capacity plan or purchase one of our Postpaid Internet Plans. 2- Reach speeds of up to 50 Mbps in the 4.5G network.

Operator	Name of Tele- phone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to an- other operator	Minutes to all op- erators	SMS to the same operator	SMS to another operator	SMS to all oper- ators	Total download capacity (Giga- bytes)	Observations
Kölbi	Plan Datos 2	₡16,146	Internet	N/A	N/A	N/A	N/A	N/A	N/A	18	1- If you need to increase your download capacity, you can switch to a higher capacity plan or purchase one of our Postpaid Internet Plans. 2- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Plan Datos 3	₡25,286	Internet	N/A	N/A	N/A	N/A	N/A	N/A	30	1- If you need to increase your download capacity, you can switch to a higher capacity plan or purchase one of our Postpaid Internet Plans. 2- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Plan Datos 4	₡29,348	Internet	N/A	N/A	N/A	N/A	N/A	N/A	50	1- If you need to increase your download capacity, you can switch to a higher capacity plan or purchase one of our Postpaid Internet Plans. 2- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Plan kölbi Datos para Dispositivos	₡2,539	Internet	N/A	N/A	N/A	N/A	N/A	N/A	40	1- This mobile connectivity service allows customers to manage, control and monitor their mobile devices in real time through the use of low data consumption applications. 2- It has multiple uses (electronic bars, vehicle tracking, card readers, and fleet control). 3- Service designed for applications that require low data traffic. 4- Allows sending and receiving national SMS (charged as excess to the plan).
Kölbi	Plan kölbi Datos y Voz para Dispositivos	₡2,539	Internet	N/A	N/A	N/A	N/A	N/A	N/A	40	1- This mobile connectivity service allows customers to manage, control and monitor their mobile devices in real time through the use of low data consumption applications. 2- It has multiple uses (electronic bars, vehicle tracking, card readers, and fleet control). 3- Service designed for applications that require low data traffic. 4- Allows sending and receiving national SMS (charged as excess to the plan).

Operator	Name of Tele-phone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to an-other operator	Minutes to all op-erators	SMS to the same operator	SMS to another operator	SMS to all oper-ators	Total download capacity (Giga-bytes)	Observations
Kölbi	Paquete 1 GIGA	₡2,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	1. This package is prioritized over the plan's consumption capacity. 2. Available to postpaid and data plan customers. 3. The pertinent fees are billed in the monthly invoice. 4. The total price of each package includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). 5. This package applies only to local data consumption. 4. It can be activated by SMS (by sending the activation word to 8888), by phone call (by dialing *888#), through the *Mi kolbi* app, or online (www.kolbi.cr).
Kölbi	PAQUETE 3 GIGAS	₡5,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	3	1. This package is prioritized over the plan's consumption capacity. 2. Available to postpaid and data plan customers. 3. The pertinent fees are billed in the monthly invoice. 4. The total price of each package includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). 5. This package applies only to local data consumption. 6. It can be activated by SMS (by sending the activation word to 8888), by phone call (by dialing *888#), through the *Mi kolbi* app, or online (www.kolbi.cr).
Kölbi	PAQUETE 6 GIGAS	₡8,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	6	1. This package is prioritized over the plan's consumption capacity. 2. Available to postpaid and data plan customers. 3. The pertinent fees are billed in the monthly invoice. 4. The total price of each package includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). 5. This package applies only to local data consumption. 6. It can be activated by SMS (by sending the activation word to 8888), by phone call (by dialing *888#), through the *Mi kolbi* app, or online (www.kolbi.cr).
Kölbi	PAQUETE 12 GIGAS	₡13,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	12	1. This package is prioritized over the plan's consumption capacity. 2. Available to postpaid and data plan customers. 3. The pertinent fees are billed in the monthly invoice. 4. The total price of each package includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). 5. This package applies only to local data consumption. 6. It can be activated by SMS (by sending the activation word to 8888), by phone call (by dialing *888#), through the *Mi kolbi* app, or online (www.kolbi.cr).

Operator	Name of Telephone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Kölbi	Paquete Ilimitado	₡2,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1. Available to postpaid and data plan customers. 2. The pertinent fees are billed in the monthly invoice. 3. This package applies only to local data consumption. 4. The total price of each package includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). 5. It can be activated by SMS (by sending the activation word to 8888), by phone call (by dialing *888#), through the *Mi kolbi* app, or online (www.kolbi.cr).
Kölbi	kölbi favoritos pospago	₡3,554	Minutes	Unlimited	N/A	100	N/A	N/A	N/A	N/A	1. Available to natural persons with a 12-24 month postpaid plan. Not available to "Fusión k" customers. 2. The "favorite number" applies only to local voice calls within the kölbi network. Does not apply to kölbi's roaming services. 3. The favorite number can be one prepaid, postpaid, or national landline number from the kölbi network. 4. Refer to the terms and conditions in kolbi.cr for more information on restrictions and exclusions.
Kölbi	Paquete de Minutos	₡2,235	Minutes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	The total monthly price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). This package is available to fixed and mobile postpaid plan customers.
Kölbi	kölbiFusión	N/A	Minutes, Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1. Bundle your services and make your life easier by: - Organizing everything into one single invoice. - Making only one payment per month. - Saving time. - Grouping of services in your name that all members of your family can enjoy. 2. Registering for this service is very easy: If you have an active "Ultra k" postpaid plan subscription, and an optical fiber kölbi home Internet subscription, visit our online store or call 1193 to activate the Grouping feature for your kölbi services.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 63. COSTA RICA: Characteristics of the postpaid mobile telecommunications packages offered in December 2024

Operator	Name of Telephone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Claro	Internet Móvil PRO	₡9,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Claro	Internet Móvil FULL	₡12,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Claro	Internet Móvil GOLD	₡14,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Claro	Internet Móvil PLATINO	₡16,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Claro	Internet Móvil DIAMOND	₡18,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	N/A
Liberty	Paquete LDI Full Nicaragua	₡1,000	Minutes	N/A	8	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI Europa	₡1,000	Minutes	N/A	25	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI América	₡1,000	Minutes	15	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI USA -Canadá	₡1,000	Minutes	18	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Liberty	Paquete LDI Estados Unidos y Canadá	₡2,000	Minutes	60	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	Paquetes de Internet América y Estados Unidos 150 MB	₡4,800	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	Terms and conditions in www.claro.cr
Claro	Paquetes de Internet *Roaming* Centroamérica 300 MB	₡8,700	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	Terms and conditions in www.claro.cr
Claro	Paquetes de Internet *Roaming* Centroamérica 500 MB	₡12,900	Internet	N/A	N/A	N/A	N/A	N/A	N/A	500 Mb	N/A
Claro	Paquetes de Internet *Roaming* Centroamérica 1 GB	₡16,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	N/A
Claro	Paquetes de Internet *Roaming* América 150 MB	₡22,600	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Claro	Paquetes de Internet *Roaming* América 300 MB	₡42,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	N/A

Operator	Name of Telephone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Claro	Paquetes de Internet América y Estados Unidos 500 MB	₡62,400	Internet	N/A	N/A	N/A	N/A	N/A	N/A	500 Mb	N/A
Claro	Paquetes de Internet *Roaming* América 1 GB	₡99,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	N/A
Claro	Paquetes de Internet *Roaming* 150 MB	₡46,750	Internet	N/A	N/A	N/A	N/A	N/A	N/A	150 Mb	N/A
Claro	Paquetes de Internet *Roaming* 300 MB	₡82,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	300 Mb	N/A
Claro	Paquetes de Internet *Roaming* 500 MB	₡121,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	500 Mb	N/A
Claro	Paquetes de Internet *Roaming* 1 GB	₡187,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	N/A
Claro	Paquetes de datos adicionales 1 GB	₡2,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	N/A
Claro	Paquetes de datos adicionales 3 GB	₡4,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	3	N/A
Claro	Paquetes de datos adicionales 5 GB	₡7,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	5	N/A
Claro	Paquetes de datos adicionales 12 GB	₡14,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	12	N/A
Claro	Paquete Europa sin fronteras vigencia 1 día	₡6,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	Paquete Europa sin fronteras vigencia 3 días	₡18,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	Paquete Europa sin fronteras vigencia 5 días	₡30,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Kölbi	*Roaming* América Internet (Pospago)	Colones	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Operator	Name of Telephone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Kölbi	Servicio Roaming Datos por Región (Pospago)	Colones	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Claro	Paquete de Roaming Japón	₡31,200	Internet	N/A	N/A	N/A	N/A	N/A	N/A	512 Mb	N/A
Liberty	Mobile service plans and packages	₡18,500	Minutes, Internet	300	N/A	Unlimited	300	N/A	Unlimited	22	Unlimited YouTube, unlimited social media (WhatsApp, Facebook, Instagram, Twitter, Waze, TikTok, Twitch). Accrue Gigas Transfer Gigas.
Liberty	Plan WiFi Móvil Plan 10GB LTE PRO Básico	₡15,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	10	Only available for use with MIFI devices.
Kölbi	Plan Pospago Ultra k1	₡10,865	Minutes, Internet	150	N/A	N/A	150	N/A	N/A	10	1- Unused GIGABYTES may be carried over for local Internet consumption the following month. 2- These phone plans may be marketed with the financing options currently available. 3- Unlimited capacity for WhatsApp, Instagram, Facebook, Waze, and X apps.
Kölbi	Plan Pospago Ultra k2	₡15,228	Minutes, Internet	N/A	300	Unlimited	N/A	300	Unlimited	15	Customers will have unlimited usage for the following apps: WhatsApp, Instagram, Waze, and X. In addition, they can select two categories of apps at no additional cost, which are detailed below: 1- SOCIAL (unlimited usage, includes TikTok, Pinterest, LinkedIn). 2- VIDEO (up to 5 GB, includes Netflix, YouTube, Disney+). 3- PRODUCTIVITY (up to 5 GB of free data usage; includes: Zoom, Teams, Web Ex). 4- MUSIC (unlimited free data; includes: Spotify, Sound Cloud, Kölbi Music).
Kölbi	Plan Pospago Ultra k3	₡20,304	Minutes, Internet	N/A	500	Unlimited	N/A	500	Unlimited	20	Users get unlimited free data in the following apps: WhatsApp, Instagram, Waze, and X. In addition, they can select two categories of apps at no additional cost, which are detailed below: 1- SOCIAL (unlimited free data; includes: Tiktok, Pinterest, LinkedIn). 2- VIDEO (up to 5 GB of free data usage; includes: Netflix, Youtube, Disney +). 3- PRODUCTIVITY (up to 5 GB of free data usage; includes: Zoom, Teams, Web Ex). 4- MUSIC (unlimited free data; includes: Spotify, Sound Cloud, Kölbi Music).

Operator	Name of Telephone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Kölbi	Plan Pospago Ultra k4	₡28,427	Minutes, Internet	N/A	700	Unlimited	N/A	700	Unlimited	28	Users get unlimited free data in the following apps: WhatsApp, Instagram, Waze, and X. In addition, they can select two categories of apps at no additional cost, which are detailed below: 1- SOCIAL (unlimited free data; includes: Tiktok, Pinterest, LinkedIn). 2- VIDEO (up to 5 GB of free data usage; includes: Netflix, Youtube, Disney +). 3- PRODUCTIVITY (up to 5 GB of free data usage; includes: Zoom, Teams, Web Ex). 4- MUSIC (unlimited free data; includes: Spotify, Sound Cloud, Kölbi Music).
Kölbi	Plan Pospago Ultra k5	₡42,645	Minutes, Internet	N/A	1000	Unlimited	N/A	1000	Unlimited	N/A	Users get unlimited free data in the following apps: WhatsApp, Instagram, Waze, and X. In addition, they can select two categories of apps at no additional cost, which are detailed below: 1- SOCIAL (unlimited free data; includes: Tiktok, Pinterest, LinkedIn). 2- VIDEO (up to 5 GB of free data usage; includes: Netflix, Youtube, Disney +). 3- PRODUCTIVITY (up to 5 GB of free data usage; includes: Zoom, Teams, Web Ex). 4- MUSIC (unlimited free data; includes: Spotify, Sound Cloud, Kölbi Music).
Kölbi	Plan Datos 1	₡13,100	Internet	N/A	N/A	N/A	Unlimited	Unlimited	Unlimited	14	1- If you need to increase your download capacity, you can switch to a higher capacity plan or purchase one of our Postpaid Internet Plans. 2- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Plan Datos 2	₡16,146	Internet	N/A	N/A	N/A	N/A	N/A	N/A	18	1- If you need to increase your download capacity, you can switch to a higher capacity plan or purchase one of our Postpaid Internet Plans. 2- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Plan Datos 3	₡25,286	Internet	N/A	N/A	N/A	N/A	N/A	N/A	30	1- If you need to increase your download capacity, you can switch to a higher capacity plan or purchase one of our Postpaid Internet Plans. 2- Reach speeds of up to 50 Mbps in the 4.5G network.

Operator	Name of Tele-phone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to an-other operator	Minutes to all op-erators	SMS to the same operator	SMS to another operator	SMS to all oper-ators	Total download capacity (Giga-bytes)	Observations
Kölbi	Plan Datos 5F	₡29,348	Internet	N/A	N/A	N/A	N/A	N/A	N/A	75	1- If you need to increase your download capacity, you can switch to a higher capacity plan or purchase one of our Postpaid Internet Plans. 2- Reach speeds of up to 50 Mbps in the 4.5G network.
Kölbi	Plan kölbi Datos para Dispositivos	₡2,539	Internet	N/A	N/A	N/A	N/A	N/A	N/A	40 Mb	1- This mobile connectivity service allows customers to manage, control and monitor their mobile devices in real time through the use of low data consumption applications. 2- It has multiple uses (electronic bars, vehicle tracking, card readers, and fleet control). 3- Service designed for applications that require low data traffic. 4- Allows sending and receiving national SMS (charged as excess to the plan).
Kölbi	Paquete de Minutos	₡2,235	Minutes	100	N/A	N/A	N/A	N/A	N/A	N/A	1- Valid for individual and business customers who have signed up for a postpaid plan with or without a phone. 2- The priority of consumption for the Minutes package is as follows: a) Minutes included in your Minutes Package. b) Minutes included in your postpaid plan. c) Once the Minutes in the Package or your plan have been used up, any additional consumption will be billed as excess usage. 3- The package is automatically renewed each month.
Kölbi	Paquete 1 GIGA	₡2,500	Internet	N/A	N/A	N/A	N/A	N/A	N/A	1	1. This package is prioritized over the plan's consumption capacity. 2. Available to postpaid and data plan customers. 3. This charge will appear on your monthly bill as a non-recurring charge. 4. The total price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). 5. This package applies only to local data consumption. 4. It can be activated by SMS (by sending the activation word to 8888), by phone call (by dialing *888#), through the *Mi kolbi* app, or online (www.kolbi.cr).

Operator	Name of Telephone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Kölbi	PAQUETE 12 GIGAS	₡13,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	12	1. This package is prioritized over the plan's consumption capacity. 2. Available to postpaid and data plan customers. 3. This charge will appear on your monthly bill as a non-recurring charge. 4. The total price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). 5. This package applies only to local data consumption. 6. It can be activated by SMS (by sending the activation word to 8888), by phone call (by dialing *888#), through the *Mi kolbi* app, or online (www.kolbi.cr).
Kölbi	PAQUETE 3 GIGAS	₡5,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	3	1. This package is prioritized over the plan's consumption capacity. 2. Available to postpaid and data plan customers. 3. This charge will appear on your monthly bill as a non-recurring charge. 4. The total price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). 5. This package applies only to local data consumption. 6. It can be activated by SMS (by sending the activation word to 8888), by phone call (by dialing *888#), through the *Mi kolbi* app, or online (www.kolbi.cr).
Kölbi	PAQUETE 6 GIGAS	₡8,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	6	1. This package is prioritized over the plan's consumption capacity. 2. Available to postpaid and data plan customers. 3. This charge will appear on your monthly bill as a non-recurring charge. 4. The total price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). 5. This package applies only to local data consumption. 6. It can be activated by SMS (by sending the activation word to 8888), by phone call (by dialing *888#), through the *Mi kolbi* app, or online (www.kolbi.cr).
Kölbi	Paquete Ilimitado	₡2,000	Internet	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1. Available to postpaid and data plan customers. 2. This charge will appear on your monthly bill as a non-recurring charge. 3. This package applies only to local data consumption. 4. The total price includes taxes and legal fees: VAT (13%), 911 (0.75%) & Red Cross (1.0%). 5. It can be activated by SMS (by sending the activation word to 8888), by phone call (by dialing *888#), through the *Mi kolbi* app, or online (www.kolbi.cr).

Operator	Name of Telephone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Kölbi	kölbi favoritos pospago	₡3,554	Minutes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1. Available to natural persons with a 12-24 month postpaid plan. Not available to "Fusión k" customers. 2. The "favorite number" applies only to local voice calls within the kölbi network. Does not apply to kölbi's roaming services. 3. The favorite number can be one prepaid, postpaid, or national landline number from the kölbi network. 4. Refer to the terms and conditions in kolbi.cr for more information on restrictions and exclusions.
Claro	Conexión 1	₡10,970	Minutes, Internet	150	150	Unlimited	150	150	Unlimited	12	Unlimited calls from Claro to Claro (only in Costa Rica). América Sin Fronteras included. See "América Sin Fronteras Terms and Conditions." WhatsApp, Waze, Facebook, Instagram, and Twitter free and unlimited. See "Connection Plans Terms and Conditions." The plan rental includes VAT, 911, and Red Cross taxes.
Claro	Conexión 2	₡14,420	Minutes, Internet	200	200	Unlimited	200	200	Unlimited	16	Unlimited calls from Claro to Claro (only in Costa Rica). América Sin Fronteras included. See "América Sin Fronteras Terms and Conditions." WhatsApp, Waze, Facebook, Instagram, and Twitter free and unlimited. See "Connection Plans Terms and Conditions." The plan rental includes VAT, 911, and Red Cross taxes.
Claro	Conexión 3	₡19,810	Minutes, Internet	300	300	Unlimited	300	300	Unlimited	22	Unlimited calls from Claro to Claro (only in Costa Rica). América Sin Fronteras included. See "América Sin Fronteras Terms and Conditions." WhatsApp, Waze, Facebook, Instagram, and Twitter free and unlimited. See "Connection Plans Terms and Conditions." The plan rental includes VAT, 911, and Red Cross taxes.
Claro	Conexión 4	₡26,100	Minutes, Internet	600	600	Unlimited	600	600	Unlimited	28	Unlimited calls from Claro to Claro (only in Costa Rica). América Sin Fronteras included. See "América Sin Fronteras Terms and Conditions." WhatsApp, Waze, Facebook, Instagram, and Twitter free and unlimited. See "Connection Plans Terms and Conditions." The plan rental includes VAT, 911, and Red Cross taxes.

Operator	Name of Tele-phone Plan	Cost without terminal	Included services	Minutes to the same operator	Minutes to another operator	Minutes to all operators	SMS to the same operator	SMS to another operator	SMS to all operators	Total download capacity (Gigabytes)	Observations
Claro	Conexión 5	₡36,660	Minutes, Internet	1500	1500	Unlimited	1500	1500	Unlimited	38	Unlimited calls from Claro to Claro (only in Costa Rica). América Sin Fronteras included. See "América Sin Fronteras Terms and Conditions." WhatsApp, Waze, Facebook, Instagram, and Twitter free and unlimited. See "Connection Plans Terms and Conditions." The plan rental includes VAT, 911, and Red Cross taxes.
Claro	Conexión 6	₡45,900	Minutes, Internet	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited		Unlimited calls from Claro to Claro (only in Costa Rica). América Sin Fronteras included. See "América Sin Fronteras Terms and Conditions." WhatsApp, Waze, Facebook, Instagram, and Twitter free and unlimited. See "Connection Plans Terms and Conditions." The plan rental includes VAT, 911, and Red Cross taxes.
Liberty	Plan Pospago LTE @1 Portabilidad	₡11,100	Minutes, Internet	150	N/A	300	150	3	300	12	Unlimited social media (WhatsApp, Facebook, Instagram, X, Waze). Accrue Gigas. Transfer Gigas.
Liberty	Plan Pospago LTE @2 Sin Celular	₡17,000	Minutes, Internet	200	N/A	Unlimited	200	N/A	Unlimited	15	Unlimited social media (WhatsApp, Facebook, Instagram, X, Waze, TikTok, Twitch). Accrue Gigas Transfer Gigas.
Liberty	Plan Pospago LTE @2 Portabilidad	₡17,000	Minutes, Internet	200	N/A	Unlimited	200	N/A	Unlimited	18	Unlimited social media (WhatsApp, Facebook, Instagram, X, Waze, TikTok, Twitch). Accrue Gigas Transfer Gigas.

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 64. COSTA RICA: Characteristics of the fixed telecommunications packages offered in December 2023

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Chan-nels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all opera-tors	Domestic minutes to another operator
Liberty	DOBLEPLAY MEGA 50	₡34,000	Fixed Internet + Television	50	Cable + Fiber	242	N/A	N/A	N/A	N/A
Liberty	DOBLEPLAY MEGA 30	₡32,000	Fixed Internet + Television	30	Cable + Fiber	242	N/A	N/A	N/A	N/A
Liberty	DOBLEPLAY MEGA 100	₡37,000	Fixed Internet + Television	100	Cable + Fiber	242	N/A	N/A	N/A	N/A
Liberty	DOBLEPLAY MEGA 200	₡52,000	Fixed Internet + Television	200	Cable + Fiber	242	N/A	N/A	N/A	N/A
Liberty	DOBLEPLAY MEGA 325	₡75,000	Fixed Internet + Television	325	Cable + Fiber	242	N/A	N/A	N/A	N/A
Liberty	TRIPLEPLAY MEGA 50	₡35,500	Fixed telephony + Fixed Internet + Television	50	Cable + Fiber	242	500	N/A	N/A	200
Liberty	TRIPLEPLAY MEGA 30	₡33,500	Fixed telephony + Fixed Internet + Television	30	Cable + Fiber	242	500	N/A	N/A	200
Liberty	TRIPLEPLAY MEGA 100	₡38,500	Fixed telephony + Fixed Internet + Television	100	Cable + Fiber	242	500	N/A	N/A	200
Liberty	TRIPLEPLAY MEGA 200	₡53,500	Fixed telephony + Fixed Internet + Television	200	Cable + Fiber	242	500	N/A	N/A	200
Liberty	TRIPLEPLAY MEGA 325	₡76,500	Fixed telephony + Fixed Internet + Television	325	Cable + Fiber	242	500	N/A	N/A	200
Liberty	Promoción Juntos Mucho Mejor	₡76,500	Fixed Internet	N/A	Cable + Fiber	N/A	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A.	TV Digital HD + 100 Mbps	₡32,900	Fixed Internet + Television	100	Cable + Fiber	209	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A..	TV Digital HD + 30 Megas	₡25,900	Fixed Internet + Television	30	Cable + Fiber	209	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A.	TV Digital HD + 50 Mbps	₡28,900	Fixed Internet + Television	50	Cable + Fiber	209	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A.	TV Digital HD + 75 Mbps	₡29,900	Fixed Internet + Television	75	Cable + Fiber	209	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A.	ONEtv HD + 100 Mbps	₡33,900	Fixed Internet + Television	100	Cable + Fiber	209	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A.	ONE TV + 200 MEGAS	₡36,500	Fixed Internet + Television	200	Cable + Fiber	209	N/A	N/A	N/A	N/A
Telecable	TV+ 45Mbps	₡31,500	Fixed Internet + Television	45	Fiber	211	N/A	N/A	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Chan-nels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all opera-tors	Domestic minutes to another operator
Telecable	TV+ 75Mbps	₡33,900	Fixed Internet + Television	75	Fiber	211	N/A	N/A	N/A	N/A
Telecable	TV+ 150Mbps	₡38,000	Fixed Internet + Television	150	Fiber	211	N/A	N/A	N/A	N/A
Telecable	TV+ 500Mbps	₡74,900	Fixed Internet + Television	500	Fiber	211	N/A	N/A	N/A	N/A
Telecable	TV+ 45Mbps+Telf	₡33,000	Fixed telephony + Fixed Internet + Television	45	Fiber	211	Unlimited	N/A	60	N/A
Telecable	TV+ 75Mbps+Telf	₡35,500	Fixed telephony + Fixed Internet + Television	75	Fiber	211	Unlimited	N/A	60	N/A
Telecable	TV+ 150Mbps+Telf	₡39,900	Fixed telephony + Fixed Internet + Television	150	Fiber	211	Unlimited	N/A	60	N/A
Telecable	TV+ 300Mbps+Telf	₡42,500	Fixed telephony + Fixed Internet + Television	300	Fiber	211	Unlimited	N/A	60	N/A
Telecable	TV+ 500Mbps+Telf	₡76,400	Fixed telephony + Fixed Internet + Television	500	Fiber	211	Unlimited	N/A	60	N/A
Telecable	TV+ 1000Mbps+Telf	₡101,400	Fixed telephony + Fixed Internet + Television	1000	Fiber	211	Unlimited	N/A	60	N/A
Telecable	+Tele 150Mbps	₡42,000	Fixed Internet + Television	150	Fiber	211	N/A	N/A	N/A	N/A
Telecable	+Tele 300 Mbps	₡45,000	Fixed Internet + Television	300	Fiber	211	N/A	N/A	N/A	N/A
Telecable	+Tele 500 Mbps	₡78,900	Fixed Internet + Television	500	Fiber	211	N/A	N/A	N/A	N/A
Telecable	+Tele 1000 Mbps	₡103,900	Fixed Internet + Television	1000	Fiber	211	N/A	N/A	N/A	N/A
Telecable	TV+ 300Mbps	₡41,000	Fixed Internet + Television	300	Fiber	211	N/A	N/A	N/A	N/A
Telecable	TV+ 1000Mbps	₡99,900	Fixed Internet + Television	1000	Fiber	211	N/A	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 10 Mbps	₡32,115	Fixed telephony + Fixed Internet + Television	10	Copper + Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 30 Mbps	₡38,208	Fixed telephony + Fixed Internet + Television	30	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 50 Mbps	₡40,239	Fixed telephony + Fixed Internet + Television	50	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 100 Mbps	₡47,348	Fixed telephony + Fixed Internet + Television	100	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 200 Mbps	₡52,425	Fixed telephony + Fixed Internet + Television	200	Fiber	119	60	N/A	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Channels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all operators	Domestic minutes to another operator
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 300 Mbps	₡87,967	Fixed telephony + Fixed Internet + Television	300	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 500 Mbps	₡123,509	Fixed telephony + Fixed Internet + Television	500	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Dúo Internet + Telefonía 10 Mbps	₡20,208	Fixed telephony + Fixed Internet	10	Copper + Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 30Mbps	₡25,286	Fixed telephony + Fixed Internet	30	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 50Mbps	₡27,317	Fixed telephony + Fixed Internet	50	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 100Mbps	₡29,348	Fixed telephony + Fixed Internet	100	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 200Mbps	₡34,425	Fixed telephony + Fixed Internet	200	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 300Mbps	₡69,967	Fixed telephony + Fixed Internet	300	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 500Mbps	₡105,509	Fixed telephony + Fixed Internet	500	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet 10Mbps	₡29,069	Fixed Internet + Television	10	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 30Mbps	₡35,162	Fixed Internet + Television	30	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 50Mbps	₡37,193	Fixed Internet + Television	50	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 100Mbps	₡44,301	Fixed Internet + Television	100	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 200Mbps	₡49,379	Fixed Internet + Television	200	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 300Mbps	₡84,921	Fixed Internet + Television	300	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 500 Mbps	₡120,463	Fixed Internet + Television	500	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo Tv + Telefonía	₡26,304	Fixed telephony + Television	N/A	Copper + Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 20Mbps	₡23,255	Fixed telephony + Fixed Internet	20	Copper + Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet 20Mbps	₡31,100	Fixed Internet + Television	20	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 1Mbps	₡29,069	Fixed telephony + Fixed Internet + Television	1	Copper + Fiber	119	60	N/A	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Chan-nels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all opera-tors	Domestic minutes to another operator
Kölbi	Plan Triple TV + Telefonía + Internet 2Mbps	₡30,084	Fixed telephony + Fixed Internet + Television	2	Copper + Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 3Mbps	₡31,100	Fixed telephony + Fixed Internet + Television	3	Copper + Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 4Mbps	₡32,115	Fixed telephony + Fixed Internet + Television	4	Copper + Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 6Mbps	₡32,115	Fixed telephony + Fixed Internet + Television	6	Copper + Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 20Mbps	₡34,146	Fixed telephony + Fixed Internet + Television	20	Copper + Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Dúo 6 Mbps + TV Digital	₡27,569	Fixed Internet + Television	6	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo 10 Mbps + TV Digital	₡27,569	Fixed Internet + Television	10	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo 20 Mbps + TV Digital	₡30,600	Fixed Internet + Television	20	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo 30 Mbps + TV Digital	₡35,693	Fixed Internet + Television	30	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo 50 Mbps + TV Digital	₡37,724	Fixed Internet + Television	50	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo 100 Mbps + TV Digital	₡39,247	Fixed Internet + Television	100	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 1Mbps	₡12,084	Fixed telephony + Fixed Internet	1	Copper + Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 2Mbps	₡15,131	Fixed telephony + Fixed Internet	2	Copper + Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 3Mbps	₡17,162	Fixed telephony + Fixed Internet	3	Copper + Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 4Mbps	₡18,177	Fixed telephony + Fixed Internet	4	Copper + Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo TV Avanzada + Internet 1Mbps	₡26,022	Fixed Internet + Television	1	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV Avanzada + Internet 2Mbps	₡27,038	Fixed Internet + Television	2	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV Avanzada + Internet 3Mbps	₡28,053	Fixed Internet + Television	3	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV Avanzada + Internet 4Mbps	₡29,069	Fixed Internet + Television	4	Copper + Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 6Mbps	₡20,208	Fixed telephony + Fixed Internet	6	Copper + Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Tv Avanzada + Internet 6Mbps	₡29,069	Fixed Internet + Television	6	Copper + Fiber	119	N/A	N/A	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Channels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all operators	Domestic minutes to another operator
Telecable	FTTH 45 + Telf Telecable	₡26,000	Fixed telephony + Fixed Internet	45	Cable + Fiber	N/A	Unlimited	N/A	60	0
Telecable	FTTH 75 + Telf Telecable	₡27,000	Fixed telephony + Fixed Internet	75	Fiber	N/A	N/A	N/A	60	N/A
Telecable	FTTH 150 + Telf Telecable	₡28,500	Fixed telephony + Fixed Internet	150	Fiber	N/A	Unlimited	N/A	60	N/A
Telecable	FTTH 300 + Telf Telecable	₡31,500	Fixed telephony + Fixed Internet	300	Fiber	N/A	Unlimited	N/A	60	N/A
Telecable	FTTH 500 + Telf Telecable	₡58,500	Fixed telephony + Fixed Internet	500	Fiber	N/A	Unlimited	N/A	60	N/A
Telecable	FTTH 1000 + Telf Telecable	₡84,500	Fixed telephony + Fixed Internet	1000	Fiber	N/A	Unlimited	N/A	60	N/A
Telecable	.+Negocios @75 Mbps +Telf+TV Telecable	₡38,000	Fixed telephony + Fixed Internet + Television	75	Fiber	240	Unlimited	N/A	60	N/A
Telecable	+Negocios @150 Mbps +Telf+TV Telecable	₡42,000	Fixed telephony + Fixed Internet + Television	150	Fiber	240	Unlimited	N/A	60	N/A
Telecable	+Negocios @300Mbps +Telf+TV Telecable	₡48,500	Fixed telephony + Fixed Internet + Television	300	Fiber	240	Unlimited	N/A	60	N/A
Telecable	+Negocios @75 Mbps+Telf Telecable	₡29,230	Fixed telephony + Fixed Internet	75	Fiber	N/A	Unlimited	N/A	60	N/A
Telecable	+Negocios @150 Mbps+Telf Telecable	₡30,730	Fixed telephony + Fixed Internet	150	Fiber	N/A	Unlimited	N/A	60	N/A
Telecable	+Negocios @300 Mbps+Telf Telecable	₡34,000	Fixed telephony + Fixed Internet	300	Fiber	N/A	Unlimited	N/A	60	N/A
Claro	Ultraconectados 5 Simétrico	₡55,000	Fixed Internet	600 Mbps	Fiber	N/A	N/A	N/A	N/A	N/A
Claro	Internet 1GB + Avanzado HD Plus + Telefonía	₡186,600	Fixed telephony + Fixed Internet + Television	1 Gbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 1GB + Avanzado HD + Telefonía	₡184,300	Fixed telephony + Fixed Internet + Television	1 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 1GB + Telefonía	₡154,100	Fixed telephony + Fixed Internet	1 Gbps	Fiber	N/A	N/A	N/A	N/A	N/A
Claro	Internet 600Mbps + Avanzado HD + Telefonía	₡84,300	Fixed telephony + Fixed Internet + Television	600 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Ultra HD Plus + 200Mbps Simétrico	₡37,000	Fixed Internet + Television	200 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Ultra HD Plus + 120Mbps Simétrico	₡34,000	Fixed Internet + Television	120 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Ultra HD + 120 Mbps Simétrico	₡32,000	Fixed Internet + Television	120 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Channels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all operators	Domestic minutes to another operator
Claro	Ultra HD + 50 Mbps Simétrico	₡29,500	Fixed Internet + Television	50 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Ultraconectados 6	₡154,100	Fixed Internet	1024 Mbps	Fiber	N/A	N/A	N/A	N/A	N/A
Claro	Ultraconectados 5	₡61,600	Fixed Internet	600 Mbps	Fiber	N/A	N/A	N/A	N/A	N/A
Claro	Ultraconectados 4 Simétrico	₡34,000	Fixed Internet	400 Mbps	Fiber	N/A	N/A	N/A	N/A	N/A
Claro	Ultraconectados 3 Simétrico	₡26,500	Fixed Internet	200 Mbps	Fiber	N/A	N/A	N/A	N/A	N/A
Claro	Ultraconectados 2 Simétrico	₡23,000	Fixed Internet	120 Mbps	Fiber	N/A	N/A	N/A	N/A	N/A
Claro	Ultraconectados 1 Simétrico	₡21,500	Fixed Internet	50 Mbps	Fiber	N/A	N/A	N/A	N/A	N/A
Claro	Internet 120Mbps Simétrico + Avanzado HD Plus + Telefonía	₡34,000	Fixed telephony + Fixed Internet + Television	120 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 120Mbps Simétrico + Avanzado HD + Telefonía	₡32,000	Fixed telephony + Fixed Internet + Television	120 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 1024Mbps + Avanzado HD Plus + Telefonía	₡186,600	Fixed telephony + Fixed Internet + Television	1024 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 600Mbps + Avanzado HD Plus + Telefonía	₡86,600	Fixed telephony + Fixed Internet + Television	600 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 400Mbps Simétrico + Avanzado HD Plus + Telefonía	₡51,300	Fixed telephony + Fixed Internet + Television	400 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 200Mbps Simétrico + Avanzado HD Plus + Telefonía	₡37,000	Fixed telephony + Fixed Internet + Television	200 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 50Mbps + Avanzado HD Plus + Telefonía	₡32,500	Fixed telephony + Fixed Internet + Television	50 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 1024Mbps + Avanzado HD + Telefonía	₡184,300	Fixed telephony + Fixed Internet + Television	1024 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 400Mbps Simétrico + Avanzado HD + Telefonía	₡49,000	Fixed telephony + Fixed Internet + Television	400 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 200Mbps + Avanzado HD + Telefonía	₡37,500	Fixed telephony + Fixed Internet + Television	200 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A
Claro	Internet 50Mbps Simétrico + Avanzado HD + Telefonía	₡29,500	Fixed telephony + Fixed Internet + Television	50 Mbps	Fiber	Digital, HD	N/A	N/A	N/A	N/A

Source: SUTEL, General Directorate of Markets. Costa Rica, 2024.

TABLE 65. COSTA RICA: Characteristics of the fixed telecommunications packages offered in December 2024

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Channels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all operators	Domestic minutes to another operator
Millicom Cable Costa Rica S.A.	TV Digital HD + 100 Mbps	₡32,900	Fixed Internet + Television	100 Mbps	Hybrid (cable + fiber)	209	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A.	TV Digital HD + 30 Megas	₡25,900	Fixed Internet + Television	30 Mbps	Hybrid (cable + fiber)	209	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A.	TV Digital HD + 50 Mbps	₡28,900	Fixed Internet + Television	50 Mbps	Hybrid (cable + fiber)	209	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A.	TV Digital HD + 75 Mbps	₡29,900	Fixed Internet + Television	75 Mbps	Hybrid (cable + fiber)	209	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A.	ONEtv HD + 100 Mbps	₡33,900	Fixed Internet + Television	100 Mbps	Hybrid (cable + fiber)	209	N/A	N/A	N/A	N/A
Millicom Cable Costa Rica S.A.	ONE TV + 200 MEGAS	₡36,500	Fixed Internet + Television	200 Mbps	Hybrid (cable + fiber)	209	N/A	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 10 Mbps	₡32,115	Fixed telephony + Fixed Internet + Television	10 Mbps	Copper, Hybrid (copper + fiber)	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 30 Mbps	₡38,208	Fixed telephony + Fixed Internet + Television	30 Mbps	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 50 Mbps	₡40,239	Fixed telephony + Fixed Internet + Television	50 Mbps	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 100 Mbps	₡45,500	Fixed telephony + Fixed Internet + Television	100 Mbps	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 200 Mbps	₡48,900	Fixed telephony + Fixed Internet + Television	200 Mbps	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 300 Mbps	₡49,600	Fixed telephony + Fixed Internet + Television	300 Mbps	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet simétrico 500 Mbps	₡76,900	Fixed telephony + Fixed Internet + Television	500 Mbps	Fiber	119	60	N/A	N/A	N/A
Kölbi	Plan Dúo Internet + Telefonía 10 Mbps	₡20,208	Fixed telephony + Fixed Internet	10 Mbps	Copper, Hybrid (copper + fiber)	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 30Mbps	₡25,286	Fixed telephony + Fixed Internet	30 Mbps	Fiber	N/A	60	N/A	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Chan-nels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all opera-tors	Domestic minutes to another operator
Kölbi	Plan Dúo Telefonía + Internet simétrico 50Mbps	₡27,317	Fixed telephony + Fixed Internet	50 Mbps	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 100Mbps	₡27,500	Fixed telephony + Fixed Internet	100 Mbps	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 200Mbps	₡30,800	Fixed telephony + Fixed Internet	200 Mbps	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 300Mbps	₡31,600	Fixed telephony + Fixed Internet	300 Mbps	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet simétrico 500Mbps	₡57,800	Fixed telephony + Fixed Internet	500 Mbps	Fiber	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet 10Mbps	₡29,069	Fixed Internet + Television	10 Mbps	Copper, Hybrid (copper + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 30Mbps	₡35,162	Fixed Internet + Television	30 Mbps	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 50Mbps	₡37,193	Fixed Internet + Television	50 Mbps	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 100Mbps	₡38,900	Fixed Internet + Television	100 Mbps	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 200Mbps	₡42,500	Fixed Internet + Television	200 Mbps	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 300Mbps	₡46,600	Fixed Internet + Television	300 Mbps	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet simétrico 500 Mbps	₡72,800	Fixed Internet + Television	500 Mbps	Fiber	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo Tv + Telefonía	₡26,304	Fixed telephony + Television	N/A	Copper, Hybrid (copper + fiber)	119	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 20Mbps	₡23,255	Fixed telephony + Fixed Internet	20 Mbps	Copper, Hybrid (copper + fiber)	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo TV + Internet 20Mbps	₡31,100	Fixed Internet + Television	20 Mbps	Copper, Hybrid (copper + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 1Mbps	₡29,069	Fixed telephony + Fixed Internet + Television	1 Mbps	Copper, Hybrid (copper + fiber)	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 2Mbps	₡30,084	Fixed telephony + Fixed Internet + Television	2 Mbps	Copper, Hybrid (copper + fiber)	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 3Mbps	₡31,100	Fixed telephony + Fixed Internet + Television	3 Mbps	Copper, Hybrid (copper + fiber)	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 4Mbps	₡32,115	Fixed telephony + Fixed Internet + Television	4 Mbps	Copper, Hybrid (copper + fiber)	119	60	N/A	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Channels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all operators	Domestic minutes to another operator
Kölbi	Plan Triple TV + Telefonía + Internet 6Mbps	₡32,115	Fixed telephony + Fixed Internet + Television	6 Mbps	Copper, Hybrid (copper + fiber)	119	60	N/A	N/A	N/A
Kölbi	Plan Triple TV + Telefonía + Internet 20Mbps	₡34,146	Fixed telephony + Fixed Internet + Television	20 Mbps	Copper, Hybrid (copper + fiber)	119	60	N/A	N/A	N/A
Kölbi	Plan Dúo 6 Mbps + TV Digital	₡27,569	Fixed Internet + Television	6 Mbps	Hybrid (cable + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo 10 Mbps + TV Digital	₡27,569	Fixed Internet + Television	10 Mbps	Hybrid (cable + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo 20 Mbps + TV Digital	₡30,600	Fixed Internet + Television	20 Mbps	Hybrid (cable + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo 30 Mbps + TV Digital	₡35,693	Fixed Internet + Television	30 Mbps	Hybrid (cable + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo 50 Mbps + TV Digital	₡37,724	Fixed Internet + Television	50 Mbps	Hybrid (cable + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo 100 Mbps + TV Digital	₡38,900	Fixed Internet + Television	100 Mbps	Hybrid (cable + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 1Mbps	₡12,084	Fixed telephony + Fixed Internet	1 Mbps	Copper, Hybrid (copper + fiber)	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 2Mbps	₡15,131	Fixed telephony + Fixed Internet	2 Mbps	Copper, Hybrid (copper + fiber)	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 3Mbps	₡17,162	Fixed telephony + Fixed Internet	3 Mbps	Copper, Hybrid (copper + fiber)	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 4Mbps	₡18,177	Fixed telephony + Fixed Internet	4 Mbps	Copper, Hybrid (copper + fiber)	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo TV Avanzada + Internet 1Mbps	₡26,022	Fixed Internet + Television	1 Mbps	Copper, Hybrid (copper + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV Avanzada + Internet 2Mbps	₡27,038	Fixed Internet + Television	2 Mbps	Copper, Hybrid (copper + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV Avanzada + Internet 3Mbps	₡28,053	Fixed Internet + Television	3 Mbps	Copper, Hybrid (copper + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo TV Avanzada + Internet 4Mbps	₡29,069	Fixed Internet + Television	4 Mbps	Copper, Hybrid (copper + fiber)	119	N/A	N/A	N/A	N/A
Kölbi	Plan Dúo Telefonía + Internet 6Mbps	₡20,208	Fixed telephony + Fixed Internet	6 Mbps	Copper, Hybrid (copper + fiber)	N/A	60	N/A	N/A	N/A
Kölbi	Plan Dúo Tv Avanzada + Internet 6Mbps	₡29,069	Fixed Internet + Television	6 Mbps	Copper, Hybrid (copper + fiber)	119	N/A	N/A	N/A	N/A
Claro	TV Individual con paquete Digital HD	₡14,700	Television	Kbps	Cable	75	N/A	N/A	N/A	N/A
Claro	TV Individual Avanzado HD	₡17,200	Television	Kbps	N/A	177	N/A	N/A	N/A	N/A
Claro	TV Individual Avanzado PLUS HD	₡21,200	Television	Kbps	Cable	208	N/A	N/A	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Channels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all opera-tors	Domestic minutes to another operator
Claro	Doble Play Avanzado plus HD + Internet hasta 10Mbps - Bolsa 150GB	₡32,500	Fixed Internet + Television	150 ps	Cable, fixed wireless	208	N/A	N/A	N/A	N/A
Claro	Triple Play Avanzado HD + Internet hasta 10Mbps - Bolsa 80GB	₡29,400	Fixed telephony + Fixed Internet + Television	80 ps	"Cable, Television Channels SD Television Channels 91 HD Channels 33 Audio Channels 52 Internet up to 10 Mbps"	176	N/A	100	100	100
Claro	Triple Play Avanzado HD Hasta 10 Mbps- bolsa 120 Gigas	₡30,800	Fixed Internet + Television	120 ps	Cable, fixed wireless	176	Unlimited	100	100	100
Claro	Doble Play Avanzado HD + Internet hasta 10Mbps - Bolsa 80GB	₡25,600	Fixed Internet + Television	80 ps	Cable, fixed wireless	176	N/A	N/A	N/A	N/A
Claro	Doble Play Avanzado HD + Internet hasta 10Mbps - Bolsa 120GB	₡27,000	Fixed Internet + Television	120 ps	Cable, fixed wireless	176	N/A	N/A	N/A	N/A
Claro	Doble Play Avanzado HD + Internet hasta 10Mbps - Bolsa 150GB	₡30,000	Fixed Internet + Television	150 ps	Cable, fixed wireless	176	N/A	N/A	N/A	N/A
Claro	Doble Play Avanzado HD + Internet hasta 8Mbps - Bolsa 180GB	₡31,500	Fixed Internet + Television	180 ps	Fixed wireless	176	N/A	N/A	N/A	N/A
Claro	Doble Play Avanzado PLUS HD + Internet hasta 10Mbps - Bolsa 80GB	₡28,100	Fixed Internet + Television	80 ps	Cable, fixed wireless	208	N/A	N/A	N/A	N/A
Claro	Doble Play Avanzado HD Plus 8 Mbps -bolsa de 180 Gigas	₡34,000	Fixed Internet + Television	180 ps	Cable, fixed wireless	208	N/A	N/A	N/A	N/A
Claro	Triple Play Avanzado HD Plus Hasta 10 Mbps -bolsa de 80 Gigas	₡31,850	Fixed Internet + Television	80 ps	Cable, fixed wireless	208	Unlimited	100	100	100
Claro	Triple Play Avanzado HD Plus Hasta 10 Mbps bolsa 120 Gigas	₡33,300	Fixed Internet + Television	120 ps	Cable, fixed wireless	208	Unlimited	100	100	100
Claro	Triple Play Avanzado HD Plus Hasta 10 Mbps -.bolsa 150 Gigas	₡36,350	Fixed telephony + Fixed Internet + Television	150 ps	Cable, fixed wireless	208	Unlimited	100	100	100

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Channels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all operators	Domestic minutes to another operator
Claro	Triple Play Avanzado HD Plus Hasta 8 Mbps -bolsa de 180 Gigas	₡37,850	Fixed telephony + Fixed Internet + Television	180 ps	Cable, fixed wireless	208	N/A	N/A	100	100
Claro	50 Mbps Simétrico + Voz IP	₡24,420	Fixed telephony + Fixed Internet	50 Mbps	Fiber	N/A	N/A	100	N/A	N/A
Claro	150 Mbps Simétrico + Voz IP	₡26,965	Fixed telephony + Fixed Internet	150 Mbps	Fiber	N/A	N/A	100	N/A	N/A
Claro	300 Mbps Simétrico + Voz IP	₡30,020	Fixed telephony + Fixed Internet	300 Mbps	Fiber	N/A	N/A	100	N/A	N/A
Claro	600 Mbps Simétrico + Voz IP	₡59,525	Fixed telephony + Fixed Internet	600 Mbps	Fiber	N/A	N/A	100	N/A	N/A
Claro	1GB+ Voz IP	₡156,800	Fixed telephony + Fixed Internet	1024 Mbps	Fiber	N/A	N/A	100	N/A	N/A
Claro	Doble Play Avanzado Plus HD + Internet hasta 10Mbps - Bolsa 120GB	₡29,500	Fixed Internet + Television	120 ps	Cable, fixed wireless	208	N/A	N/A	N/A	N/A
Claro	Triple Play Avanzado HD + Internet hasta 10Mbps - Bolsa 150GB	₡33,300	Fixed telephony + Fixed Internet + Television	150 ps	Cable, fixed wireless	176	Unlimited	100	100	100
Claro	600 Mbps Simétrico + Avanzado HD	₡71,950	Fixed Internet + Television	600 Mbps	Fiber	95	N/A	N/A	N/A	N/A
Claro	600 Mbps Simétricos + Avanzado Plus	₡74,280	Fixed Internet + Television	600 Mbps	Fiber	140	N/A	N/A	N/A	N/A
Claro	1GB + Avanzado Plus	₡92,900	Fixed Internet + Television	1024 Mbps	Fiber	140	N/A	N/A	N/A	N/A
Claro	1GB + Avanzado HD	₡90,560	Fixed Internet + Television	1024 Mbps	Fiber	95	N/A	N/A	N/A	N/A
Claro	600 Mbps Simétrico + Avanzado HD + Voz IP	₡71,950	Fixed Internet + Television	600 Mbps	Fiber	95	Unlimited	N/A	100	100
Claro	1GB + Avanzado HD + Voz IP	₡90,560	Fixed Internet + Television	1024 Mbps	Fiber	95	Unlimited	N/A	N/A	100
Claro	600 Mbps Simétrico + Avanzado Plus + Voz IP	₡74,280	Fixed Internet + Television	600 Mbps	Fiber	140	Unlimited	N/A	N/A	100
Claro	120Mbps Simétrico + Avanzado HD	₡23,795	Fixed Internet + Television	120 Mbps	Fiber	100	N/A	N/A	N/A	N/A
Claro	200 Mbps Simétrico + Avanzado HD	₡25,830	Fixed Internet + Television	200 Mbps	Fiber	100	N/A	N/A	N/A	N/A
Claro	500 Mbps Simétrico + Avanzado HD	₡35,420	Fixed Internet + Television	500 Mbps	Fiber	100	N/A	N/A	N/A	N/A
Claro	600 Mbps Simétrico + Avanzado HD	₡38,295	Fixed Internet + Television	600 Mbps	Fiber	100	N/A	N/A	N/A	N/A
Claro	1024 Mbps Simétrico + Avanzado HD	₡54,170	Fixed Internet + Television	1024 Mbps	Fiber	100	N/A	N/A	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Channels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all operators	Domestic minutes to another operator
Claro	120 Mbps Simétricos + Avanzado Plus	₡26,205	Fixed Internet + Television	120 Mbps	Fiber	130	N/A	N/A	N/A	N/A
Claro	200 Mbps Simétricos + Avanzado Plus	₡27,425	Fixed Internet + Television	200 Mbps	Fiber	130	N/A	N/A	N/A	N/A
Claro	400 Mbps Simétricos + Avanzado Plus	₡33,605	Fixed Internet + Television	400 Mbps	Fiber	130	N/A	N/A	N/A	N/A
Claro	500 Mbps Simétricos + Avanzado Plus	₡37,020	Fixed Internet + Television	500 Mbps	Fiber	130	N/A	N/A	N/A	N/A
Claro	600 Mbps Simétricos + Avanzado Plus	₡40,125	Fixed Internet + Television	600 Mbps	Fiber	130	N/A	N/A	N/A	N/A
Claro	1024 Mbps Simétricos + Avanzado Plus	₡55,575	Fixed Internet + Television	1024 Mbps	Fiber	130	N/A	N/A	N/A	N/A
Claro	120 Mbps Simétrico + Avanzado HD + Voz IP	₡23,795	Fixed telephony + Fixed Internet + Television	120 Mbps	Fiber	100	N/A	100	N/A	N/A
Claro	200 Mbps Simétrico + Avanzado HD + Voz IP	₡25,830	Fixed telephony + Fixed Internet + Television	200 Mbps	Fiber	100	N/A	100	N/A	N/A
Claro	400 Mbps Simétrico + Avanzado HD + Voz IP	₡31,805	Fixed telephony + Fixed Internet + Television	400 Mbps	Fiber	100	N/A	100	N/A	N/A
Claro	500 Mbps Simétrico + Avanzado HD + Voz IP	₡35,420	Fixed telephony + Fixed Internet + Television	500 Mbps	Fiber	100	N/A	100	N/A	N/A
Claro	600 Mbps Simétrico + Avanzado HD + Voz IP	₡38,295	Fixed telephony + Fixed Internet + Television	600 Mbps	Cable + Fiber	100	N/A	100	N/A	N/A
Claro	1024 Mbps Simétrico + Avanzado HD + Voz IP	₡54,170	Fixed telephony + Fixed Internet + Television	1024 Mbps	Fiber	100	N/A	100	N/A	N/A
Claro	120 Mbps Simétrico + Avanzado Plus + Voz IP	₡26,205	Fixed telephony + Fixed Internet + Television	120 Mbps	Fiber	130	N/A	100	N/A	N/A
Claro	200 Mbps Simétrico + Avanzado Plus + Voz IP	₡27,425	Fixed telephony + Fixed Internet + Television	200 Mbps	Fiber	130	N/A	100	N/A	N/A
Claro	500 Mbps Simétrico + Avanzado Plus + Voz IP	₡37,020	Fixed telephony + Fixed Internet + Television	500 Mbps	Fiber	130	N/A	100	N/A	N/A
Claro	400 Mbps Simétrico + Avanzado Plus + Voz IP	₡33,605	Fixed telephony + Fixed Internet + Television	400 Mbps	Fiber	130	N/A	100	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Chan-nels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all opera-tors	Domestic minutes to another operator
Claro	600 Mbps Simétrico + Avanzado Plus + Voz IP	₡40,125	Fixed telephony + Fixed Internet + Television	600 Mbps	Fiber	130	N/A	100	N/A	N/A
Claro	1024 Mbps Simétrico + Avanzado Plus + Voz IP	₡55,575	Fixed telephony + Fixed Internet + Television	1024 Mbps	Fiber	130	N/A	100	N/A	N/A
Claro	400 Mbps Simétrico + Avanzado HD	₡31,805	Fixed Internet + Television	400 Mbps	Fiber	100	N/A	N/A	N/A	N/A
Telecable	FTTH 45+TV DIG	₡27,500	Fixed Internet + Television	45 Mbps	Fiber	214	N/A	N/A	N/A	N/A
Telecable	FTTH 1000+TV DIG	₡58,900	Fixed Internet + Television	1000 Mbps	Fiber	215	N/A	N/A	N/A	N/A
Telecable	FTTH 45+ TPLAY	₡29,500	Fixed Internet + Television	45 Mbps	Fiber	211	N/A	N/A	N/A	N/A
Liberty	Doble Play 120 Megas	₡24,040.93	Fixed Internet + Television	120 Mbps	Copper, Cable, Fiber, Hybrid (copper + fiber), Hybrid (cable + fiber)	55	N/A	N/A	N/A	N/A
Liberty	Doble Play 200 Megas	₡29,347.59	Fixed Internet + Television	200 Mbps	Copper, Cable, Fiber, Hybrid (copper + fiber), Hybrid (cable + fiber)	250	N/A	N/A	N/A	N/A
Liberty	Doble Play 300 Megas	₡36,240.54	Fixed Internet + Television	300 Mbps	N/A	250	N/A	N/A	N/A	N/A
Liberty	Doble Play 500 Megas	₡45,379.91	Fixed Internet + Television	500 Mbps	Copper, Cable, Fiber, Hybrid (copper + fiber), Hybrid (cable + fiber)	250	N/A	N/A	N/A	N/A
Liberty	Triple Play 120 Mbps	₡25,056.42	Fixed telephony + Fixed Internet + Television	120 Mbps	Copper, Cable, Fiber, Hybrid (copper + fiber), Hybrid (cable + fiber)	55	500	N/A	N/A	200
Liberty	Triple Play 200 Megas	₡30,306.05	Fixed telephony + Fixed Internet + Television	200 Mbps	Copper, Cable, Fiber, Hybrid (copper + fiber), Hybrid (cable + fiber)	250	500	N/A	N/A	200
Liberty	Triple Play 300 Megas	₡37,256.02	Fixed telephony + Fixed Internet + Television	300 Mbps	Copper, Cable, Fiber, Hybrid (copper + fiber), Hybrid (cable + fiber)	250	500	N/A	N/A	200
Liberty	Triple Play 500 Megas	₡46,395.40	Fixed telephony + Fixed Internet + Television	500 Mbps	Copper, Cable, Fiber, Hybrid (copper + fiber), Hybrid (cable + fiber)	250	500	N/A	N/A	200
Telecable	FTTH 200+TV DIG	₡29,500	Fixed Internet + Television	200 Mbps	Fiber	215	N/A	N/A	N/A	N/A
Telecable	FTTH 400+TV DIG Promo	₡33,900	Fixed Internet + Television	400 Mbps	Fiber	215	N/A	N/A	N/A	N/A
Telecable	FTTH 600+TV DIG Promo	₡45,000	Fixed Internet + Television	600 Mbps	Fiber	215	N/A	N/A	N/A	N/A

Operator	Name of Package	Cost	Services	Download Speed (Mbps)	Type of Internet Connection	Number of Channels	Domestic minutes to the same operator's fixed network	Domestic minutes to mobile networks	Minutes to all operators	Domestic minutes to another operator
Telecable	FTTH 400 + TPLAY	₡38,000	Fixed Internet + Television	400 Mbps	Fiber	211	N/A	N/A	N/A	N/A
Telecable	FTTH 200 + TPLAY	₡31,500	Fixed Internet + Television	200 Mbps	Fiber	211	N/A	N/A	N/A	N/A
Telecable	FTTH 600 + TPLAY	₡50,900	Fixed Internet + Television	600 Mbps	Fiber	211	N/A	N/A	N/A	N/A
Telecable	FTTH 1000 + TPLAY	₡60,900	Fixed Internet + Television	1000 Mbps	Fiber	211	N/A	N/A	N/A	N/A
Telecable	FTTH 400 + TPLAY PRO	₡39,000	Fixed Internet + Television	400 Mbps	Fiber	211	N/A	N/A	N/A	N/A
Telecable	FTTH 1000 + TPLAY PRO	₡61,900	Fixed Internet + Television	1000 Mbps	Fiber	211	N/A	N/A	N/A	N/A
Telecable	FTTH 200 + TPLAY PRO	₡32,500	Fixed Internet + Television	200 Mbps	Fiber	211	N/A	N/A	N/A	N/A
Telecable	FTTH 600 + TPLAY PRO	₡51,900	Fixed Internet + Television	600 Mbps	Fiber	211	N/A	N/A	N/A	N/A
Telecable	FTTH 1000+TV DIG+TELF	₡60,400	Fixed telephony + Fixed Internet + Television	1000 Mbps	Fiber	215	Unlimited	N/A	N/A	60
Telecable	FTTH 600+TV DIG+TELF	₡50,400	Fixed telephony + Fixed Internet + Television	600 Mbps	Fiber	215	Unlimited	N/A	N/A	60
Telecable	FTTH 400+TV DIG+TELF	₡37,500	Fixed telephony + Fixed Internet + Television	400 Mbps	Fiber	215	Unlimited	N/A	N/A	60
Telecable	FTTH 200+TV DIG+TELF	₡31,000	Fixed telephony + Fixed Internet + Television	200 Mbps	Fiber	215	Unlimited	N/A	N/A	60
Telecable	FTTH 45+TV DIG+TELF	₡29,000	Fixed telephony + Fixed Internet + Television	45 Mbps	Fiber	215	Unlimited	N/A	N/A	60
Telecable	FTTH 1000+TELF	₡53,500	Fixed telephony + Fixed Internet	1000 Mbps	Fiber	N/A	Unlimited	N/A	N/A	60
Telecable	FTTH 600+TELF	₡42,500	Fixed telephony + Television	600 Mbps	Fiber	N/A	Unlimited	N/A	N/A	60
Telecable	FTTH 400+TELF	₡29,500	Fixed telephony + Fixed Internet	400 Mbps	Fiber	N/A	Unlimited	N/A	N/A	60
Telecable	FTTH 200+TELF	₡26,500	Fixed telephony + Fixed Internet	200 Mbps	Fiber	N/A	Unlimited	N/A	N/A	60
Telecable	FTTH 45+TELF	₡24,000	Fixed telephony + Fixed Internet	45 Mbps	Fiber	N/A	Unlimited	N/A	N/A	60

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TABLE 66. COSTA RICA: Total number of projects developed in a year by FONATEL per project life cycle phase in 2015-2024

Status	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
In initiation	0	0	0	0	0	0	0	0	0	1
In planning	14	18	14	8	7	5	5	5	1	7
In progress	13	14	21	28	27	28	31	31	30	34
In closing	0	0	0	0	2	4	2	2	3	4
Total	**27**	**32**	**35**	**36**	**36**	**37**	**38**	**38**	**34**	**46**

Note: In 2023, there will be four fewer projects than in 2022, as connectivity for the districts included in four of the projects in the planning phase will be provided through the Radio Spectrum Auction for 5G.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 67. COSTA RICA: Number of districts with at least one program in development with FONATEL resources, per program, in 2015-2024

Program	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Connected Communities	11	32	72	72	103	127	128	128	128	130
Connected Households	0	216	381	434	471	475	483	484	487	488
Provisioned Public Centers	0	0	172	263	263	263	263	456	468	468
Connected Public Spaces	0	0	0	0	178	313	315	315	315	315
Education Network	0	0	0	0	0	0	57	162	176	176
Total	**11**	**231**	**391**	**460**	**478**	**481**	**484**	**484**	**491**	**491**
Country coverage	2 %	48 %	81 %	94 %	98 %	99 %	99 %	99 %	100 %	100 %

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 68. COSTA RICA: Number of devices granted through programs developed with FONATEL resources to provide access to ICTs, per program, in 2016-2024
(yearly aggregate figures)

Program	2016	2017	2018	2019	2020	2021	2022	2023	2024
Connected Households	10,089	30,418	84,268	130,579	148,426	181,644	186,402	186,558	186,558
Provisioned Public Centers	0	6,407	36,004	36,831	36,831	36,831	115,317	123,643	123,643
Total	**10,089**	**36,825**	**120,272**	**167,410**	**185,257**	**218,475**	**301,201**	**310,201**	**310,201**

Note: The number of devices granted in 2022 under the Connected Households Program was adjusted following an exhaustive analysis of the data collected from Project #1. During said audit, it was determined that Delivered devices Connected under the "assigned" status, that were waiting for assistance due to some restriction, were incorrectly counted towards the total.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 69. COSTA RICA: Number of Centers for the Provision of Public Services that have received benefits through FONATEL programs, per program, in 2015-2024
(yearly aggregate figures)

Program	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Connected Communities	15	94	234	600	996	1,446	1,777	1,828	1,916	1,975
Provisioned Public Centers	0	0	0	3,787	3,809	3,809	3,809	6,102	6,332	6,332
Education Network	0	0	0	0	0	0	133	600	682	682
Total	**15**	**94**	**234**	**4,387**	**4,805**	**5,255**	**5,719**	**8,530**	**8,930**	**8,989**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 70. COSTA RICA: Number of inhabitants, dwellings, and households with access to voice and data services in districts in which programs are in development with FONATEL resources in 2015-2024
(figures in thousands)

Indicator	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Inhabitants	76,739	269,740	393,088	905,496	1,171,572	1,368,676	1,695,417	1,782,051	1,758,452	1,791,104
Households	23,212	82,421	121,028	285,284	370,662	419,584	468,419	507,665	515,835	532,911
Dwellings	22,799	80,830	118,606	278,616	365,421	413,543	463,947	504,319	512,442	529,167

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 71. COSTA RICA: Number of fixed telephony and fixed Internet subscriptions provided through programs in development with FONATEL resources in 2015-2024

Service	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Fixed Telephony	10	112	387	1,131	3,409	3,351	5,000	5,102	5,679	3,725
Fixed Internet	19	10,575	31,532	86,038	141,065	175,402	226,867	249,899	269,417	272,106
Mobile telephony	12,334	27,871	38,603	36,683	40,429	31,234	32,925	99,398	97,519	171,620

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 72. COSTA RICA: Amount of the population that has benefited from FONATEL programs in 2015-2024

Indicator	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Population	12,428	62,821	142,253	317,640	502,791	628,571	977,165	1,238,739	1,304,195	1,356,902

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 73. COSTA RICA: Equity and year-over-year variation rate of FONATEL in 2015-2024

(yearly figures in millions of colones)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Equity	143,265	161,306	171,551	200,979	200,847	211,188	204,683	157,171	104,921	92,680
% of variation	9 %	13 %	6 %	17 %	0 %	5 %	-3 %	-23 %	-33 %	-12 %

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 74. COSTA RICA: Special parafiscal contributions [CEPF as per its acronym in Spanish] and year-over-year variation rate in 2015-2024

(yearly figures in millions of colones)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Collected CEPF	11,674	12,434	12,936	13,453	14,079	14,297	13,890	10,399	14,285	14,119
% of variation	17 %	7 %	4 %	4 %	5 %	2 %	-3 %	-25 %	37 %	-1 %

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 75. COSTA RICA: Investment by FONATEL per program in 2013-2024

(yearly figures in millions of colones)

Program	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2023	Total
Connected Communities	49	3,077	2821	454	1,971	4,754	1,937	10,855	4,610	7,243	2,904	6,039	46,529
Connected Households	0	0	0	734	6,060	17,298	21,205	17,366	21,006	12,697	18,919	12,427	127,712
Provisioned Public Centers	0	0	0	0	4,752	3,357	1,464	0	0	23,467	13,857	0	46,897
Connected Public Spaces	0	0	0	0	0	0	981	3,740	6,550	7,708	5,957	4,676	29,612
Education Network	0	0	0	0	0	0	0	0	1,013	4,659	7,417	7,437	20 ,526
Total	49	3,077	2,821	1,188	12,783	25,409	25,587	31,960	33,179	55,774	49,054	30,579	271,277

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 76. COSTA RICA: Investment by FONATEL per operator in 2015-2024
(yearly figures in millions of colones)

Operator	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Total
RACSA	0	0	4,752	3,357	1,741	1,322	2,561	27,005	18,684	4,114	63,537
ICE	2,061	141	2,263	5,607	4,056	12,309	4,977	7,714	4,848	8,009	52,019
Telecable	0	103	1,372	4,416	7,072	5,919	9,418	7,706	9,389	6,599	51,993
Liberty[1]	760	438	3,011	6,009	6,196	4,120	6,647	3,944	3,545	2,723	37,969
Tigo	0	0	188	3,143	3,649	3,209	3,680	1,495	3,468	1,625	20,457
Coopeguanacaste	0	0	6	96	303	1,310	2,352	4,762	5,189	4,811	18,829
Claro	0	431	724	1,419	1,453	2,591	1,919	1,961	1,728	1,297	16,037
Coopelesca	0	37	194	601	463	706	654	501	1,479	667	5,302
Coopesantos	0	38	272	577	648	416	811	573	564	561	4,460
Cable Pacayas (Teki)	0	0	0	0	0	58	125	70	114	113	479
Coopealfaro	0	0	0	0	0	0	36	44	42	39	162
Cable Caribe	0	0	0	0	0	0	0	0	4	20	24
Cable Visión	0	0	0	0	6	0	0	0	0	0	6
Cablenet	0	0	0	0	0	0	0	0	0	1	1
Total	2,821	1,188	12,783	25,226	25,587	31,960	33,179	55,774	49,054	30,579	271,277

Note: 1 The data from this service provider includes the data reported by "Liberty Telecomunicaciones (Telefónica)" and "Liberty Servicios Fijos (Cabletica)". These used to be reported separately in previous reports. The data is now aggregated due to the merger of "Telefónica" and "Cabletica" under the "Liberty" brand in 2022. The data collected from FONATEL programs and projects is not broken down by company name or license, but rather by network operator and/or service provider.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 77. COSTA RICA: Achievement of the 2015-2021 PNDT's Goal #1 and the 2022-2027 PNDT's Goal #4: to provide districts with access to voice and data services through the Connected Communities Program in 2015-2024

Indicator	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Districts	11	32	72	72	103	127	128	128	128	130
Annual goal[1]	12	32	72	72	125	125	183	MSP[2]	MSP[2]	138
Achievement % of annual goal	92 %	100 %	100 %	100 %	82 %	102 %	70 %	N/A	N/A	94 %
Total goal[1]	183	183	183	183	183	183	183	262	262	262
Achievement % of total goal	6 %	17 %	39 %	39 %	56 %	69 %	70 %	49 %	49 %	50 %
Country coverage	2 %	7 %	15 %	15 %	21 %	26 %	26 %	26 %	26 %	26 %

1 The goals set in the 2015-2021 PNDT were last updated in February 2021, while the goals in the 2022-2027 PNDT were last updated in December 2022.
2 MSP: This goal does not have a planned timetable or target. No target or objective has been set for this goal in the year of reference

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 78. COSTA RICA: Achievement of the 2015-2021 PNDT's Goal #2 and the 2022-2027 PNDT's Goal #3: to provide indigenous territories with access to voice and data services through the Connected Communities Program in 2019-2024

Indicator	2019	2020	2021	2022	2023	2024[2]
Territories	2	2	6	9	14	17
Annual goal[1]	4	4	20	9	15	17
Achievement % of annual goal	50 %	50 %	30 %	100 %	93 %	100 %
Total goal[1]	20	20	20	24	24	24
Achievement % of total goal	5 %	15 %	30 %	38 %	58 %	71 %
Territory coverage	4 %	13 %	25 %	38 %	58 %	71 %

Notes: 1 The goals set in the 2015-2021 PNDT were last updated in February 2021, while the goals in the 2022-2027 PNDT were last updated in December 2022.
2 The data includes the Quitirrisí territory covered by market extension.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 79. COSTA RICA: Distribution of districts with (total or partial) connectivity to voice and data services, per region, as a result of the Connected Communities Program in 2015-2024
(yearly aggregate figures)

Region	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Huetar Caribe	3	3	17	17	19	19	19	19	19	19
Huetar Norte	8	25	25	25	25	25	25	25	25	25
Brunca	0	4	30	30	30	30	30	30	30	30
Chorotega	0	0	0	0	29	39	40	40	40	40
Pacífico Central	0	0	0	0	0	14	14	14	14	16
Total	**11**	**32**	**72**	**72**	**103**	**127**	**128**	**128**	**128**	**130**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 80. COSTA RICA: Total number of projects developed in a year through the Connected Communities Program, per project life cycle phase, in 2015-2024

Status	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
In initiation	0	0	0	0	0	0	0	0	0	1
In planning	13	17	13	6	6	4	4	4	0	6
In progress	13	13	19	26	25	24	26	26	26	29
In closing	0	0	0	0	1	4	2	2	2	3
Total	**26**	**30**	**32**	**32**	**32**	**32**	**32**	**32**	**28**	**39**

Note: Two projects completed in 2020 were expanded in 2021 (Guatuso and Los Chiles).
In 2023, there will be four fewer projects than in 2022, as connectivity for the districts included in four of the projects in the planning phase will be provided through the Radio Spectrum Auction for 5G.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 81. COSTA RICA: Distribution of towers equipped with telecommunications infrastructure in operation through the Connected Communities Program, per region, in 2015-2024

(yearly aggregate figures)

Region	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Huetar Caribe	7	7	7	62	111	116	127	134	143	154
Huetar Norte	24	143	143	147	148	173	175	175	175	175
Brunca	0	0	50	115	115	116	118	128	142	146
Chorotega	0	0	0	0	57	114	129	131	137	138
Pacífico Central	0	0	0	0	0	69	77	81	85	102
Total	**31**	**150**	**200**	**324**	**431**	**588**	**626**	**649**	**682**	**715**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 82. COSTA RICA: Distribution of towers equipped with telecommunications infrastructure in operation through the Connected Communities Program, per indigenous territory, in 2019-2024

(yearly aggregate figures)

Territory	2019	2020	2021	2022	2023	2024
Maleku de Guatuso	2	2	2	2	2	2
Chorotega de Matambú	4	4	4	4	4	4
Bribrí de Keköldi (Cocles)	0	0	4	4	4	4
Bribrí de Talamanca	0	0	4	4	5	13
Brunka de Curré (Rey Curré)	0	0	2	4	4	5
Cabécar de Chirripó (Duchii)	0	0	1	1	8	9
Cabécar de Talamanca	0	0	1	3	4	4
Bribrí de Salitre	0	0	0	3	4	4
Cabécar de Tayní	0	0	0	3	3	3
Cabécar de Ujarrás	0	0	0	1	2	2
Bribrí de Cabagra	0	0	0	0	5	5
Guaymí de Conteburica	0	0	0	0	4	4
Guaymí de Altos de San Antonio	0	0	0	0	1	1
Cabécar de Bajo Chirripó						2
Cabécar de China Kichá						2
Teribe de Térraba						1
Total	**6**	**6**	**18**	**29**	**50**	**65**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 83. COSTA RICA: Number of Centers for the Provision of Public Services that were provided Internet access through the Connected Communities Program, per institution, in 2015-2024

(yearly aggregate figures)

Institution	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
MEP	15	94	234	573	923	1,352	1,640	1,683	1,744	1,794
MICITT	0	0	0	5	11	15	23	26	30	32
CEN CINAI	0	0	0	23	63	66	97	98	103	104
CCSS	0	0	0	0	0	14	17	21	39	45
Total	**15**	**94**	**234**	**601**	**997**	**1,447**	**1,777**	**1,828**	**1,916**	**1,975**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 84. COSTA RICA: Number of Centers for the Provision of Public Services that were provided Internet access through the Connected Communities Program, per indigenous territory, in 2018-2024

(yearly aggregate figures)

Territory	2018	2019	2020	2021	2022	2023	2024
Maleku de Guatuso	8	9	9	9	9	9	9
Brunca de Curré (Rey Curré)	0	1	1	2	7	7	8
Teribe de Térraba	0	1	1	1	1	1	1
Chorotega de Matambú	0	0	3	4	4	4	4
Bribrí de Keköldi (Cocles)	0	0	1	1	3	3	3
Bribrí de Talamanca	0	0	0	4	7	9	25
Cabécar de Ujarrás	0	0	0	0	5	5	5
Bribrí de Salitre	0	0	0	0	5	8	9
Cabécar de Talamanca	0	0	0	0	4	4	6
Cabécar de Tayní	0	0	0	0	3	3	3
Bribrí de Cabagra	0	0	0	0	0	11	16
Guaymí de Conteburica	0	0	0	0	0	4	7
Guaymí de Altos De San Antonio	0	0	0	0	0	1	1
Cabécar de Chirripó (Duchii)							5
Cabécar de Bajo Chirripó							2
Cabécar de China Kichá							1
Total	**8**	**11**	**15**	**21**	**48**	**69**	**105**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 85. COSTA RICA: Number of inhabitants, households and dwellings in districts with (total or partial) connectivity that were provided potential access to voice and data services through the Connected Communities Program, 2015-2024

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Inhabitants	76,739	237,639	294,488	631,625	803,267	932,564	943,986	955,260	966,467	1,001,348
Dwellings	22,799	71,208	89,099	194,405	250,543	288,555	301,721	315,630	326,621	341,068
Households	23,212	72,745	90,765	197,129	254,138	292,773	304,630	317,723	328,783	343,566

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 86. COSTA RICA: Subscriptions to fixed telephone services, fixed Internet access, and mobile telephony provided through the Connected Communities Program, 2015−2024

Service	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Fixed Telephony	10	112	387	1,131	3,409	3,351	5,000	5,102	5,679	3,725
Fixed Internet	19	486	1,114	1,770	10,486	26,976	33,078	35,178	37,330	32,645
Mobile Telephony	12,334	27,871	38,603	36,683	40,429	31,234	32,925	99,398	97,519	171,620

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 87. COSTA RICA: Amount of the population that has benefited from the Connected Communities Program, 2015-2024

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Target population	12,428	29,863	43,561	46,011	82,195	120,196	136,934	189,031	210,738	268,412

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 88. COSTA RICA: Number of fixed Internet subscriptions provided through the Connected Communities Program, per region, 2015-2024

Region	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Huetar Caribe	19	13	13	14	2,171	6,657	7,992	8,671	10,256	8,599
Huetar Norte	0	473	894	1,378	5,720	13,515	15,865	16,869	16,647	14,814
Brunca	0	0	207	378	2,595	6,253	7,514	6,935	7,193	6,495
Pacífico	0	0	0	0	0	314	664	1090	1253	1176
Chorotega	0	0	0	0	0	237	1043	1613	1981	1561
Total	**19**	**486**	**1114**	**1770**	**10,486**	**26,976**	**33,078**	**35,178**	**37,330**	**32,645**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 89. COSTA RICA: Number of fixed telephony subscriptions provided through the Connected Communities Program, per region, 2015-2024

Region	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Huetar Caribe	10	3	2	5	873	1,064	1,462	1,263	1,467	371
Huetar Norte	0	109	278	873	1,543	332	79	49	38	29
Brunca	0	0	107	253	993	1,404	1,752	997	940	588
Pacífico Central	0	0	0	0	0	314	664	1,090	1,253	1,176
Chorotega	0	0	0	0	0	237	1,043	1,613	1,981	1,561
Total	**10**	**112**	**387**	**1,131**	**3,409**	**3,351**	**5,000**	**5,012**	**5,679**	**3,725**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 90. COSTA RICA: Distribution of subscriptions to the mobile telephony provided through the infrastructure facilitated by the Connected Communities Program by region, 2015-2024

Region	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Huetar Caribe	792	1,565	2,290	1,865	6,230	8,682	9,067	52,953	47,302	100,905
Huetar Norte	11,542	26,306	33,491	32,273	29,861	17,349	18,423	19,276	20,566	21,700
Brunca	0	0	2,822	2,545	4,338	5,203	5435	27,169	29,651	49,015
Total	**12,334**	**27,871**	**38,603**	**36,683**	**40,429**	**31,234**	**32,925**	**99,398**	**97,519**	**171,620**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 91. COSTA RICA: Distribution of investment made through the Connected Communities Program, per operator, 2015-2024
(yearly figures in millions of colones)

Operator	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Total
ICE	2,061	5	1,213	3,083	434	8,179	2,674	5,279	1,129	4,633	**28,725**
Claro	0	431	724	1,419	1,453	2,591	1,918	1,938	1,683	1,267	**15,939**
Liberty	760	18	33	68	49	85	18	25	65	140	**1,838**
Telecable	0	0	0	0	0	0	0	0	27	0	**27**
Total	**2821**	**454**	**1,971**	**4,570**	**1,937**	**10,855**	**4,610**	**7,243**	**2,904**	**6,039**	**46,529**

Note: The total value corresponds to the sum of the amounts executed from 2013 to 2024.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 92. COSTA RICA: Subsidies granted under the Connected Households Program per project, 2016-2024
(yearly aggregate figures)

Status	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total subsidies	10,089	30,418	84,268	130,579	148,426	193,789	226,552	270,875	287,242
Project 1	10,089	30,418	84,268	130,579	148,426	181,644	186,402	186,558	186,558
Project 2	0	0	0	0	0	12,145	40,150	84,317	100,684

Note: The data for 2022 and 2023 for Project 1 includes households that, after fulfilling the requirements for Goal 5, moved to Goal 7 to extend their benefits, and households that reached the end of the subsidy period.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 93. COSTA RICA: Number of households that have benefited from the Connected Households Program, per status, 2016-2024
(yearly aggregate figures)

Status	2016	2017	2018	2019	2020	2021	2022	2023	2024
Beneficiaries	10,089	30,418	84,268	130,579	148,426	193,789	211,721	232,087	239,461
Active service	9,947	28,806	78,815	117,719	126,095	166,512	170,410	156,190	113,379
Inactive status	142	1,612	5,453	12,860	22,331	27,277	41,311	75,897	126,082

Note: The 2023 active household data was adjusted to exclude households that are moving from one project to another.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 94. COSTA RICA: Achievement of the 2015-2021 PNDT's Goal #43 and the 2022-2027 PNDT's Goal #7: to subsidize the Internet service of households with students through the Connected Households Program, 2020-2024

Indicator	2020	2021	2022	2023	2024
Beneficiaries	0	12,145	40,150	84,317	100,684
Annual goal[1]	10,684	100,684	40,684	100,684	100,684
Achievement % of annual goal	0 %	12 %	99 %	84 %	100 %
Total goal[1]	100,684	100,684	100,685	100,684	100,685
Achievement % of total goal	0 %	12 %	40 %	84 %	100 %

1 The goals set in the 2015-2021 PNDT were last updated in February 2021, while the goals in the 2022-2027 PNDT were last updated in December 2022.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 95. COSTA RICA: Number of households that have benefited from the Connected Households Program per quintile of income, 2016-2024
(yearly aggregate figures)

Quintile of income	2016	2017	2018	2019	2020	2021	2022	2023	2024
1st quintile	9,832	24,981	71,431	109,432	124,393	156,895	168,844	180,713	185,275
2nd quintile	256	4,283	10,536	17,402	19,885	30,126	34,368	40,795	42,852
3rd quintile	1	1,154	2,301	3,745	4,148	6,768	8,509	10,579	11,334
Total	**10,089**	**30,418**	**84,268**	**130,579**	**148,426**	**193,789**	**211,721**	**232,087**	**239,461**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 96. COSTA RICA: Number of households that have benefited from the Connected Households Program per operator, 2016-2024

(yearly aggregate figures)

Operator	2016	2017	2018	2019	2020	2021	2022	2023	2024
Telecable	2,124	6,059	22,915	37,361	43,966	62,215	67,608	72,645	73,786
Liberty	5,018	13,608	30,590	40,033	43,853	53,729	57,154	58,950	58,256
Tigo	488	3,242	13,646	21,613	24,313	32,081	33,491	43,650	36,205
ICE	1,237	4,694	10,726	23,279	26,867	30,119	35,037	35,722	49,962
Coopelesca	658	1,684	3,060	3,940	4,546	7,472	9,056	9,723	10,223
Coopesantos	458	947	2,982	3,921	4,274	6,174	6,742	7,046	7,274
Coopeguanacaste	106	184	324	402	426	863	982	2,039	1,208
Cable Pacayas (Teki)	0	0	0	8	181	696	957	1,267	1,351
Coopealfaroruiz	0	0	0	0	0	300	301	710	430
Claro	0	0	0	0	0	140	353	163	528
Cable Caribe	0	0	0	0	0	0	40	161	222
Cable Visión	0	0	25	22	0	0	0	0	0
Cablenet									16
In progress	0	0	0	0	0	0	0	11	0
Total	**10,089**	**30,418**	**84,268**	**130,579**	**148,426**	**193,789**	**211,721**	**232,087**	**239,461**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 97. COSTA RICA: Percentage of total households that have benefited from the Connected Households Program, per province, 2016-2024

(yearly figures in percentage terms)

Province	2016	2017	2018	2019	2020	2021	2022	2023	2024
San Jose	1 %	2 %	6 %	8 %	9 %	11 %	11 %	12 %	12 %
Alajuela	1 %	2 %	4 %	7 %	8 %	11 %	11 %	12 %	12 %
Cartago	0 %	1 %	5 %	8 %	10 %	13 %	13 %	13 %	14 %
Heredia	0 %	2 %	4 %	6 %	7 %	9 %	9 %	9 %	9 %
Guanacaste	1 %	4 %	9 %	12 %	14 %	18 %	18 %	18 %	18 %
Puntarenas	1 %	3 %	8 %	12 %	13 %	17 %	18 %	20 %	20 %
Limon	1 %	3 %	4 %	6 %	7 %	10 %	11 %	11 %	11 %
Total	**1 %**	**2 %**	**5 %**	**8 %**	**9 %**	**12 %**	**12 %**	**13 %**	**13 %**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 98. COSTA RICA: Districts with coverage under the Connected Households Program, 2016-2024

	2016	2017	2018	2019	2020	2021	2022	2023	2024
Districts	216	381	434	471	475	482	484	487	488
Country coverage	45 %	79 %	89 %	97 %	97 %	99 %	99 %	99 %	99 %

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 99. COSTA RICA: Total net active Internet subscriptions that were subsidized through the Connected Households Program, 2016-2024

(yearly aggregate figures)

Indicator	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total Subscriptions	9,947	28,806	78,815	117,719	126,095	166,512	170,410	156,190	113,379
Net Subscriptions	8,097	23,448	64,155	67,335	72,126	114,893	117,583	107,771	78,232

Note: The 2023 active household data was adjusted to exclude households that are moving from one project to another.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 100. COSTA RICA: Total penetration of residential fixed Internet service under the Connected Households Program and its contribution to market penetration, 2016-2024

(yearly figures in percentage terms)

Indicator	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total Penetration	0.7 %	1.9 %	5.1 %	7.5 %	8.0 %	10.1 %	9.9 %	8.8 %	6.3 %
Contribution to market penetration	1.6 %	3.9 %	9.4 %	13.0 %	12.7 %	15.7 %	15.4 %	13.6 %	9.5 %

Note: The 2023 active household data was adjusted to exclude households that are moving from one project to another.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 101. COSTA RICA: Amount of the population that has benefited from the Connected Households Program, 2021-2024

Status	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total target population[1]	34,666	104,518	289,549	449,394	510,449	660,796	725,898	800,635	836,655
Project 1 (goal 5 of the PNDT 2015-2021)	34,666	104,518	289,549	449,394	510,449	618,602	627,944	918,925	628,272
Project 2 (goal 7 of the PNDT 2022-2027)	0	0	0	0	0	42,194	147,916	310,393	369,295

1 Any person who was a beneficiary of more than one project was only counted once towards the total.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 102. COSTA RICA: Percentage of investment made through the Connected Households Program, per operator, 2016-2024

(yearly figures in millions of colones)

Operator	2016	2017	2018	2019	2020	2021	2022	2023	2024	Total
Telecable	103	1,372	4,416	6,622	4,752	7,612	3,886	5,925	3,549	38,239
Liberty	420	2,978	5,941	6,146	4,035	5,696	3,588	3,434	2,368	34,605
ICE	136	1,050	2,524	3,621	4,131	2,303	2,435	3,718	3,376	23,294
Tigo	0	188	3,143	3,649	3,209	3,680	1,495	3,468	1,625	20,457
Coopesantos	38	272	577	648	416	811	573	564	561	4,460
Coopelesca	37	194	601	463	706	654	501	1,479	667	5,302
Coopeguanacaste	0	6	96	50	59	88	83	125	78	583
Cable Pacayas (Teki)	0	0	0	0	58	125	70	114	113	479
Coopealfaroruiz	0	0	0	0	0	36	44	42	39	162
Claro	0	0	0	0	0	1	23	45	31	99
Cable Caribe	0	0	0	0	0	0	0	4	20	24
Cable Visión	0	0	0	6	0	0	0	0	0	6
Cablenet	0	0	0	6	0	0	0	0	1	1
Total investment	**734**	**6,060**	**17,298**	**21,205**	**17,366**	**21,006**	**12,697**	**18,919**	**12,427**	**127,712**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 103. COSTA RICA: Number of devices delivered to CPSPs for accessing ICTs through the Provisioned Public Centers Program, 2017-2024

(yearly aggregate figures)

Year	2017	2018	2019	2020	2021	2022	2023	2024
Devices delivered	6,407	36,004	36,831	36,831	36,831	115,317	123,643	123,643

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 104. COSTA RICA: Distribution of devices for accessing ICTs delivered through the Provisioned Public Centers Program, per institution, 2018-2024

(yearly aggregate figures)

Institution	2018	2019	2020	2021	2022	2023	2024
MEP	25,678	26,388	26,388	26,388	104,874	113,200	113,200
MICITT	4,941	5,058	5,058	5,058	5,058	5,058	5,058
CCSS	4,318	4,318	4,318	4,318	4,318	4,318	4,318
CEN CINAI	1,067	1,067	1,067	1,067	1,067	1,067	1,067
Total	**36,004**	**36,831**	**36,831**	**36,831**	**115,317**	**123,643**	**123,643**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 105. COSTA RICA: Distribution of CPSPs that have benefited from the Provisioned Public Centers Program, per institution, 2018-2024
(yearly aggregate figures)

Institution	2018	2019	2020	2021	2022	2023	2024
CCSS	3,134	3,134	3,134	3,134	3,134	3,134	3,134
MEP	335	335	335	335	2,628	2,858	2,858
MICITT	246	268	268	268	268	268	268
CEN CINAI	72	72	72	72	72	72	72
Total	**3,787**	**3,809**	**3,809**	**3,809**	**6,102**	**6,332**	**6,332**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 106. COSTA RICA: Districts with coverage under the Provisioned Public Centers Program, 2017-2024
(yearly aggregate figures)

	2017	2018	2019	2020	2021	2022	2023	2024
Districts with coverage	172	263	263	263	263	456	468	468
Country coverage	36 %	54 %	54 %	54 %	54 %	93 %	95 %	95 %

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 107. COSTA RICA: Investments made through the Provisioned Public Centers Program, 2017-2024
(yearly figures in millions of colones)

	2017	2018	2019	2020	2021	2022	2023	2024	Total
Cost of investment	4,752	3,357	1,464	0	0	23,467	13,857	0	**46,897**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 108. COSTA RICA: Free digital Internet access zones put into service through the Connected Public Spaces Program by state, 2019-2024
(half-yearly aggregate figures)

Status	2019	2020	2021	2022	2023	2024
Active subsidy	301	510	513	513	411	308
Completed subsidy with active service	0	0	0	0	65	119
Completed subsidy with inactive service	0	0	0	0	37	86

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 109. COSTA RICA: Number of new and total users, hours of connection time, data traffic (in GB), and sessions initiated by users, due to the Connected Public Spaces Program, 2019-2024

Indicator	2019	2020	2021	2022	2023	2024	Total
Total users	399,218	715,716	1,683,033	2,050,106	1,531,524	1,636,506	8,016,103
Single users	239,062	339,783	599,050	618,562	560,617	620,482	2,977,556
Hours of use	790,644	1,358,995	3,862,881	4,775,330	3,337,615	2,705,882	16,831,346
Traffic (GB)	85,869	242,929	889,843	1,049,681	706,507	607,937	3,582,765
Sessions started	1,269,812	2,957,749	6,942,592	8,079,075	5,551,326	4,976,978	29,777,532

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 110. COSTA RICA: Investment made through the Connected Public Spaces Program, per operator, 2019-2024
(yearly figures in millions of colones)

Operator	2019	2020	2021	2022	2023	2024	Total
RACSA-ICE	278	1,322	2,561	2,741	2,609	1,679	11,191
Coopeguanacaste	253	1,251	2,221	2,779	1,885	1,777	10,167
Telecable	450	1,167	1,767	2,188	1,463	1,220	8,254
Total	**981**	**3,740**	**6,550**	**7,708**	**5,957**	**4,676**	**29,612**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 111. COSTA RICA: Achievement of the 2015-2021 PNDT's Goal #14 and the 2022-2027 PNDT's Goal #5: to achieve progress with FONATEL's Education Network Program, 2021-2024

Indicator	2021	2022	2023	2024
FONATEL's area of focus	19.8 %	25.8 %	26.5 %	38.2 %
Annual goal[1]	39.6 %	MSP[2]	MSP[2]	MSP[2]
Achievement % of annual goal	50 %	NA	NA	NA
Total goal[1]	39.6 %	100 %	100 %	100 %
Achievement % of total goal	50 %	26 %	26 %	38 %

Notes:
1 The goals set in the 2015-2021 PNDT were last updated in February 2021, while the goals in the 2022-2027 PNDT were last updated in December 2022.
2MSP: This goal does not have a planned timetable or target. No target or objective has been set for this goal in the year of reference.
3 The progress reported in 2024 corresponds to the update of the calculation formula included in the Action Plan for Goal 5, approved by the SUTEL Council under agreement 011-032-2024.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 112. COSTA RICA: Number of education centers [EC] served through the Education Network Program, per status, 2021-2024
(yearly aggregate figures)

Indicator[1]	2021	2022	2023	2024
Total ECs assigned to FONATEL's area of focus	2,375	2,375	2,375	2,138
ECs requiring attention	516	673	683	2,123
ECs inspected to determine the technical requirements for installation	487	725	748	682
ECs where the technical requirements for installation have been met	485	725	747	682
ECs with a proposed solution under review	283	642	693	682
ECs with a fully approved solution	262	625	685	682
ECs provided with connectivity and internal networks	168	601	682	682
ECs connected to the Education Network	133	600	682	682

Note:
1 EC = education center.

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 113. COSTA RICA: Number of education centers [EC] connected through the Education Network Program, per broadband speed in Mbps, 2021-2024
(yearly aggregate figures)

Broadband (Mbps)	2021	2022	2023	2024
15 Mbps	2	34	34	34
40 Mbps	5	53	53	53
100 Mbps	69	297	352	352
175 Mbps	40	141	159	159
300 Mbps	15	64	70	70
500 Mbps	2	11	14	14
Total	**133**	**600**	**682**	**682**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 114. COSTA RICA: Distribution of education centers [EC] connected through the Education Network Program, per operator, 2021-2024
(yearly aggregate figures)

Operator	2021	2022	2023	2024
Telecable	79	180	185	185
Coopeguanacaste	39	245	253	253
RACSA-ICE-PC	15	136	205	205
Liberty		39	39	39
Total	**133**	**600**	**682**	**682**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 115. COSTA RICA: Distribution of education centers [EC] connected through the Education Network Program, per province, 2021-2024
(yearly aggregate figures)

Province	2021	2022	2023	2024
San Jose	37	88	96	96
Alajuela	6	154	156	156
Heredia	0	20	25	25
Cartago	2	35	37	37
Guanacaste	33	98	102	102
Puntarenas	45	106	109	109
Limon	10	99	157	157
Total	**133**	**600**	**682**	**682**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 116. COSTA RICA: Districts with coverage under the Education Network Program, 2021-2024
(yearly aggregate figures)

Districts	2021	2022	2023	2024
Cumulative	57	162	176	176
Country coverage	12 %	33 %	36 %	36 %

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 117. COSTA RICA: Number of students enrolled in the education centers [EC] connected through the Education Network Program, 2021-2024
(yearly aggregate figures)

Students	2021	2022	2023	2024
Cumulative	33,643	141,861	161,564	162,210
Half-yearly	532	108,218	19,703	646

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 118. COSTA RICA: Number of new and total users, hours of connection time, data traffic (in TB), and sessions initiated by users under the Education Network Program, 2021-2024
(yearly aggregate figures)

Indicator	2021	2022	2023	2024	Total
Total Users	15,598	956,897	1,916,943	2,715,912	5,605,350
Single users	13,630	266,466	405,656	558,370	1,244,122
Hours of use	69,125	5,353,434	9,663,609	12,443,642	27,529,811
Data traffic (TB)	6	381,218	1,209,905	1,955,687	3,546,817
Sessions started	80,263	5,920,783	13,032,012	18,376,603	37,409,661

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

TABLE 119. COSTA RICA: Investment made under the Education Network Program, per operator, 2021-2024

(yearly figures in millions of colones)

Operator	2021	2022	2023	2024	Total
Coopeguanacaste	43	1,900	3,179	2,956	8,078
Telecable	38	1,632	1,974	1,830	5,474
ICE-RACSA-PC	0	797	2,218	2,435	5,449
Liberty	932	331	46	216	1,525
Total	**1,013**	**4,659**	**7,417**	**7,437**	**20,526**

Source: SUTEL, General Directorate of FONATEL. Costa Rica, 2024.

ACRONYMS

A4AI	The acronym of the *Alliance for Affordable Internet*. Alliance for Affordable Internet
AON	The acronym for *Active Optical Networks*. Active Optical Networks
ARESEP	The acronym of the "Autoridad Reguladora de los Servicios Públicos" [Public Utilities Regulatory Authority].
ARPU	The acronym for *Average Revenue per User*.
BCCR	The acronym of the "Banco Central de Costa Rica" [Central Bank of Costa Rica].
IDB	The acronym of the Inter-American Development Bank.
CCSS	The acronym of the "Caja Costarricense de Seguro Social" [Social Security Administration of Costa Rica].
CECI´s	The acronym of the "Centros Comunitarios Inteligentes" [Intelligence Community Centers].
CEN CINAI	The acronyms of the "Centros de Educación y Nutrición" [Education and Nutrition Centers] and the "Centros Infantiles de Atención Integral" [Children's Comprehensive Care Centers].
CEPF	The acronym for "Contribución Especial Parafiscal" [Special Parafiscal Contribution].
CGR	The acronym of the "Contraloría General de la República" [Office of the Comptroller General of the Republic]
COMEX	The acronym of the "Ministerio de Comercio Exterior" [Ministry of Foreign Trade]
COPROCOM	The acronym of the "Comisión para Promover la Competencia" [Commission for the Promotion of Competition].
CPSP´s	The acronym of the "Centros de Prestación de Servicios Públicos" [Centers for the Provision of Public Services].

DGC	The acronym of the "Dirección General de Calidad" [General Directorate of Quality].
DGCO	The acronym of the "Dirección General de Competencia" [General Directorate of Competition]
DGF	The acronym of the "Dirección General de FONATEL" [General Directorate of FONATEL].
DGM	The acronym of the "Dirección General de Mercados" [General Directorate of Markets].
DWDM	The acronym for *Dense Wavelength Division Multiplexing*. Dense wavelength division multiplexing is a higher bandwidth fiber optic technology that uses multiple simultaneous wavelengths.
EBAIS	The acronym of the "Equipos Básicos de Atención Integral en Salud" [Basic Comprehensive Health Care Teams].
ENAHO	The acronym for "Encuesta Nacional de Hogares" [National Household Survey].
ENIGH	The acronym for "Encuesta Nacional de Ingresos y Gastos de los Hogares" [National Survey of Household Income and Expenditures].
QAF	The acronym for Quality Adjustment Factor.
FTTx	The acronym for *Fiber-to-the-X*; a generic term for network architecture that uses optical fiber for last mile telecommunications.
FONATEL	The acronym of the "Fondo Nacional de Telecomunicaciones" [National Telecommunications Fund].
GB	Gigabyte
GIS	The acronym for *Geographic Information System*. Geographic Information System
GSM	The acronym for *Global System for Mobile Communications*. Global System for Mobile Communications
HFC	The acronym for *Hybrid Fiber-Coaxial*. Hybrid fiber-copper networks that use DOCSIS, or other similar technologies, for the provision of services.
HHI	The acronym for the Herfindahl-Hirschman Index; a common measure of market concentration.
ICE	The acronym of the "Instituto Costarricense de Electricidad" [Costa Rican Institute of Electricity].

IMAS	The acronym of the "Instituto Mixto de Ayuda Social" [Joint Institute of Social Assistance].
INEC	The acronym of the "Instituto Nacional de Estadística y Censos" [National Institute of Statistics and Censuses].
IP	The acronym for *Internet Protocol*. Internet Protocol: Set of rules and standards for digital data communication, functionally classified in the Network layer according to the international OSI (Open Systems Interconnection) model.
IPIF	The acronym for "índice de Precios de Internet Fijo" [Fixed Internet Price Index].
IPTM	The acronym for "Índice de Precios de Telecomunicaciones Móviles" [Mobile Telecommunications Price Index].
IPTV	The acronym for *Internet Protocol Television*. Internet Protocol Television
ISO	The acronym of the International Organization for Standardization. International Organization for Standardization
IXP	The acronym for Internet Exchange Point. Internet Exchange Point
kbps	Kilobits per second
LGT	The acronym for the "Ley General de Telecomunicaciones" [General Telecommunications Act], Act No. 8642
LTE	The acronym for *Long Term Evolution*. Long-term evolution: wireless broadband technology designed primarily to support mobile phone and portable device access to the Internet.
Mbps	Megabits per second
MEIC	The acronym of the "Ministerio de Economía, Industria y Comercio" [Ministry of Economy, Industry and Commerce].
MEP	Ministry of Public Education
MH	Ministry of Finance
MICITT	The acronym of the "Ministerio de Ciencia, Tecnología y Telecomunicaciones" [Ministry of Science, Technology and Telecommunications].
MIDEPLAN	The acronym of the "Ministerio de Planificación Nacional y Política Económica" [Ministry of National Planning and Economic Policy].

MIVAH	The acronym of the "Ministerio de Viviendas y Acentamientos Humanos" [Ministry of Housing and Human Settlements].
MMDS	The acronym for *Multichannel Multipoint Distribution Services*. Multichannel Multipoint Distribution Services
MMS	The acronym for *Multimedia Messaging System*. Multimedia Messaging System
MS	The acronym of the "Ministerio de Salud" [Ministry of Health].
OECD	The acronym of the Organization for Economic Co-operation and Development.
Off-net	This term refers to voice calls and/or short messages that originate from an outside network that is different to the target network.
On-net	This term refers to voice calls and/or short messages that originate from the same network as the target network.
PAPyP	The acronym for "Plan Anual de Proyectos y Programas" [Annual Project and Program Plan].
PBAS	The acronym for "Programa Banda Ancha Solidaria" [Broadband Solidarity Program].
PCC	Connected Communities Program
PCPE	Provisioned Public Centers Program
PEPC	Connected Public Spaces Program
PHC	Connected Households Program
GDP	The acronym for Gross Domestic Product.
PNDT	The acronym for "Plan Nacional de Desarrollo de las Telecomunicaciones" [National Telecommunications Development Plan].
UNDP	The acronym for United Nations Development Program.
PON	The acronym for *Passive Optical Networks*. Passive Optical Networks
pp	The acronym for Percentage Points.
PRE	The acronym for Education Network Program.
QoSE	The acronym for Quality of Service Experienced by the User.

RCS	The acronym for "Resolución del Consejo de Sutel" [SUTEL Board Resolution].
RPCS	The acronym for "Reglamento de Prestación y Calidad de Servicios" [Service Provision and Quality Regulations].
SDH	The acronym for *Synchronous Digital Hierarchy*. Protocol for transferring bit streams synchronously over fiber.
SMS	The acronym for Short Messaging Service. Short Messaging Service
SITEL	The acronym for "Sistema de Indicadores de Telecomunicaciones" [Telecommunication Indicators System].
SUTEL	Superintendency of Telecommunications.
TB	Terabyte
UG	Management Unit in charge of executing FONATEL programs and projects.
ITU	International Telecommunication Union A special agency of the United Nations in charge of regulating the provision of telecommunication services by operators and providers at an international level.
USB	The acronym for *Universal Serial Bus*. A device with a universal serial port for data storage.
VoIP	The acronym for Voice over Internet Protocol.
VPN	The acronym for *Virtual Private Network*. Virtual Private Network
xDSL	The acronym for *Digital Subscriber Line*. A technology that uses a copper telephone platform for access.

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SUPERINTENDENCIA DE
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