



2025

COSTA RICA

TELECOMMUNICATIONS

SECTOR STATISTICS

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INTRODUCTION

The Superintendency of Telecommunications (SUTEL) presents the 2025 Annual Report on Telecommunications Sector Statistics, an essential tool for evidence-based regulation. Information and statistics are a strategic asset for properly monitoring the market, identifying problems, measuring results, and justifying decisions. During this period, the market trend shifted from rapid infrastructure expansion to a stage of maturity and structural consolidation, where connectivity serves as the foundation for productivity, education, and social integration.

By 2025, the sector's revenue totaled 935,734 million colones, a 1.37% increase compared to the previous year. Although this figure confirms the industry's economic significance—growing at a rate exceeding 4.6% of the national economy—it also reflects the consolidation of a mature market.

The sector's evolution reveals a paradigm shift, in which connectivity has evolved from being measured in voice minutes to a continuous supply of data-focused broadband. In this new context, fixed and mobile Internet access has established itself as the industry's main driver; in fact, in the fixed Internet segment, annual revenue grew by 26.65% over the past year, driven by a massive migration of users to speeds exceeding 100 Mbps, representing 65.84% of users.

In line with this, mobile telecommunications services are showing a shift in consumption patterns; average monthly voice traffic fell from 62 minutes in 2021 to 31 minutes in 2025, while mobile data consumption rose from 4.7 GB in 2021 to 7.8 GB in 2025. This trend reflects greater use of the capabilities offered by fourth- and fifth-generation mobile networks, which have driven growing adoption of data-based digital services.



Traditional basic copper landline service continues to decline, while Voice over IP (VoIP) has become the modern standard for service subscriptions, surpassing 321,000 lines by the end of 2025 and accounting for 54% of the fixed-line voice market. Finally, dedicated lines continue to show stable growth, primarily in the business and government sectors.

The deployment of fiber-optic networks maintained rapid growth, reaching a total of 129,435 kilometers installed by 2025. This progress has improved residential connections, where fiber-optic service grew by 31.61% over the past year, replacing hybrid fiber-coaxial (HFC) networks, and is preparing the country for the 5G network.

As for investment as a percentage of GDP, it stood at 0.24% in 2025, reflecting a phase of normalization and asset optimization following the historic effort of 2021 (0.57% of GDP) required during the health emergency, and the workforce totaled 11,777 direct jobs (0.50% of the economically active population).

Costa Rican households are showing a profound shift in their consumption and entertainment habits. On the one hand, fixed-line Internet access reached a penetration rate of 71% of households, establishing itself as an essential service for 7 out of 10 households. In contrast, subscription television saw its penetration rate drop to 43% in 2025, down from 51% in 2021. In the area of bundled services—although the Internet-TV combination remains the preferred option—there was a downward adjustment in 2025, with subscriptions falling to 511,792, while Triple Play packages (TV-Internet-VoIP) grew by 245% between 2021 and 2025, demonstrating an increase in user preference for IP-based solutions.

In the mobile market, penetration reached 137% per capita. Most notable is the structural shift toward postpaid plans, which now account for 56% of all lines, stabilizing operators' revenues compared to prepaid plans (44%). Likewise, mobile Internet achieved a penetration rate of 106% per capita (5.5 million subscriptions), making mobile phones the primary means of accessing information, with 45.5% of traffic browsing at speeds exceeding 8-15 Mbps.

The preparation of this report is made possible by the commitment, transparency, and timely collaboration of all operators and providers in the national market, who supply the technical information necessary to produce this valuable resource for the country.

This report aims to serve as a reliable, transparent, and internationally recognized analytical tool—indispensable for evidence-based decision-making and for successfully guiding socioeconomic development toward a fully connected and digitally mature future.

Carlos Watson Carazo, Engineer
Chairman of the Board



GENERAL DEVELOPMENTS IN THE SECTOR

Revenue behavior of the Telecommunications Sector

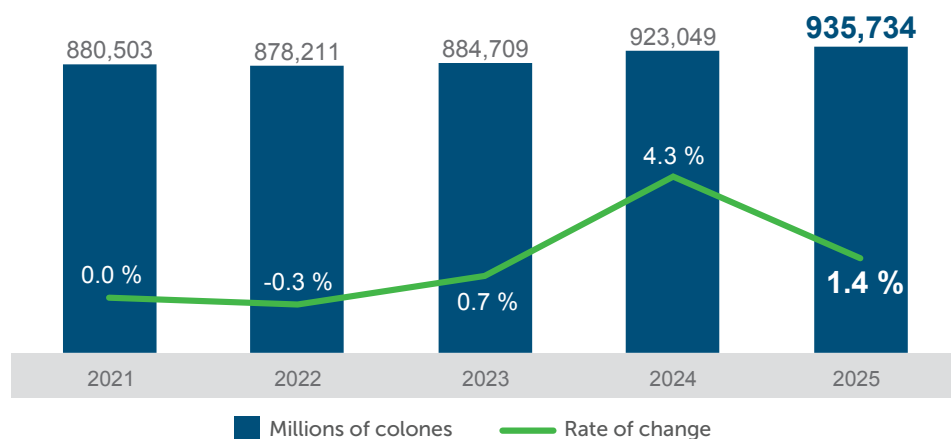
By 2025, the market recorded 935,734 million colones in revenue, marking a 1.37% increase compared to 2024, which indicates that the market is reaching maturity, as revenue growth has slowed.

The percentage changes indicate that growth is not uniform, with some years showing higher increases and others more moderate rates. This pattern suggests that the sector is influenced by both structural factors—such as high demand for connectivity and data services—and the macroeconomic environment, as well as changes in household and business consumption.

By 2025, the market recorded 935,734 million colones in revenue, representing a **1.37%** increase compared to 2024

Furthermore, the graph shows that, toward the end of the period, total revenue reached its highest levels, confirming the economic importance of the telecommunications sector and its role in supporting digital transformation and national economic activity.

GRAPH NO. 01
COSTA RICA: Total revenue generated by the Telecommunications Sector, 2021-2025
 (yearly figures in millions of colones)



Note: As of July 22, 2026, the measurement of total revenue for the telecommunications sector formally includes figures for subscription TV services. This update reflects strategic alignment with the international standards established by the International Telecommunication Union (ITU).
 Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.



Total revenue generated by the Telecommunications Sector per type of service

Mobile telephony (voice)

Mobile telephony (voice) shows a downward trend or stagnation in revenue throughout the analyzed period. This trend is consistent with the maturity of the service, its replacement by Internet-based messaging and communication apps, and the decline in the use of traditional voice services. Despite this, the service continues to generate a significant volume of revenue, reflecting its large installed user base.

Internet Access (fixed and mobile)

Internet access services—both fixed and mobile—show a clear upward trend during the 2021–2025 period, establishing themselves as the sector's main growth driver. The sustained increase in revenue is driven by higher usage intensity, demand for faster speeds, the widespread adoption of digital services, and the cross-cutting role of Internet access in productive, educational, and social activities. This trend indicates a structural shift in the sector's revenue generation pattern.

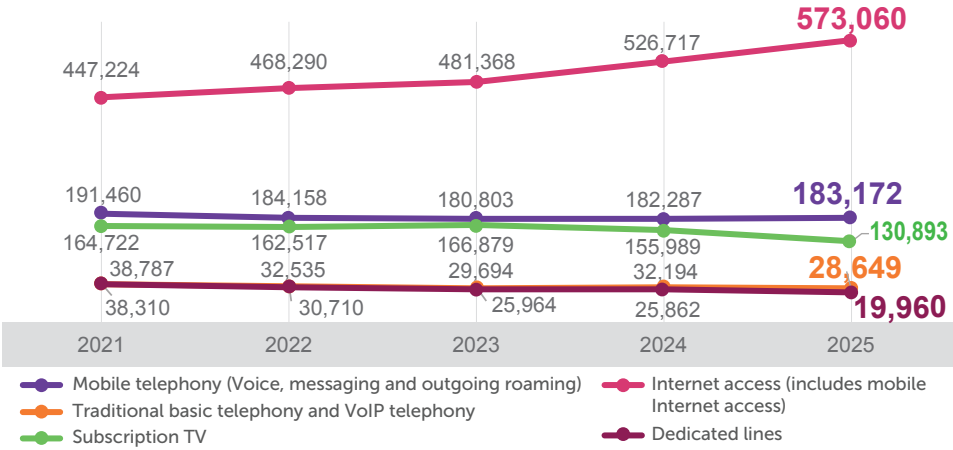
Fixed telephony (POTS & VoIP)

Traditional fixed telephony continues to decline, driven by technological substitution and a reduction in the number of subscriptions. In contrast, VoIP fixed telephony shows a more stable trend, although it accounts for a smaller share of the sector's total revenue. Overall, fixed telephony is gradually losing ground to data-based services.

Dedicated lines

The dedicated lines service shows relatively stable performance, with moderate variations from year to year. This service retains its importance in the business and government segments, although its share of total revenue is smaller compared to mass-market services. Its evolution is closely linked to the performance of the productive sector and the demand for specialized connectivity.

GRAPH NO. 02
COSTA RICA: Total revenue generated by the Telecommunications Sector per type of service, 2021-2025
(yearly figures in millions of colones)



Note: As of July 22, 2026, the measurement of total revenue for the telecommunications sector formally includes figures for subscription TV services. This update reflects strategic alignment with the international standards established by the International Telecommunication Union (ITU).
Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Number of subscriptions by type of telecommunications service bundle

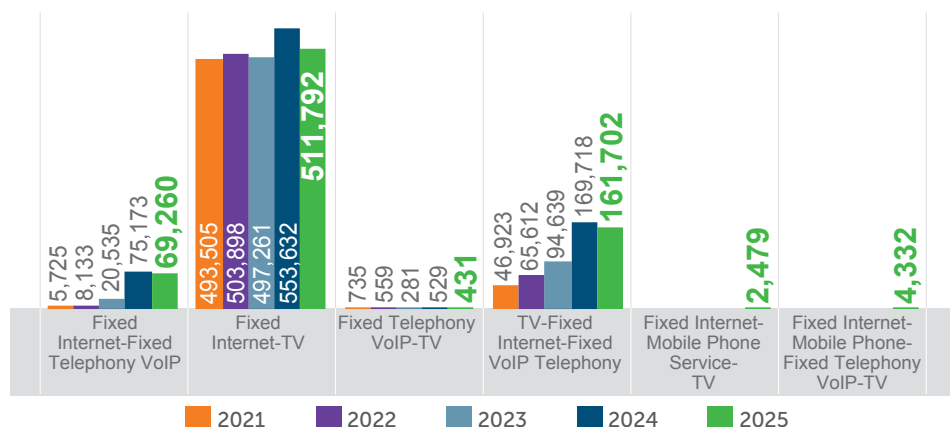
Graph no. 03 reveals a clear predominance and consolidation of the Fixed Internet-TV bundle as the preferred option among users, with figures remaining substantially higher than those of the other categories, peaking at over 550,000 subscriptions in 2024. However, the rapid growth of Triple Play bundles (TV-Fixed Internet-Fixed VoIP Telephony) is noteworthy, as they experienced an increase of nearly 245% between 2021 and 2025. This trend suggests that the Costa Rican market is shifting toward comprehensive connectivity solutions, where consumers seek to consolidate all their entertainment and communication services under a single provider.

The **Fixed Internet-TV** bundle is the preferred option among users

On the other hand, a phenomenon of stabilization or saturation is observed toward the end of the analyzed period. In nearly all major categories, subscriptions peaked in 2024 and then showed a slight decline in 2025. For example, the fixed-line Internet and TV bundle fell from 553,632 to 511,792 subscriptions. This trend

could indicate a market shakeout or a shift in consumer habits, where users may be opting for individual, unbundled services or new mobile technologies that are not reflected as strongly in the traditional fixed-line bundles shown in the graph.

GRAPH NO. 03
COSTA RICA: Number of subscriptions per type of telecommunication service bundle, 2021-2025



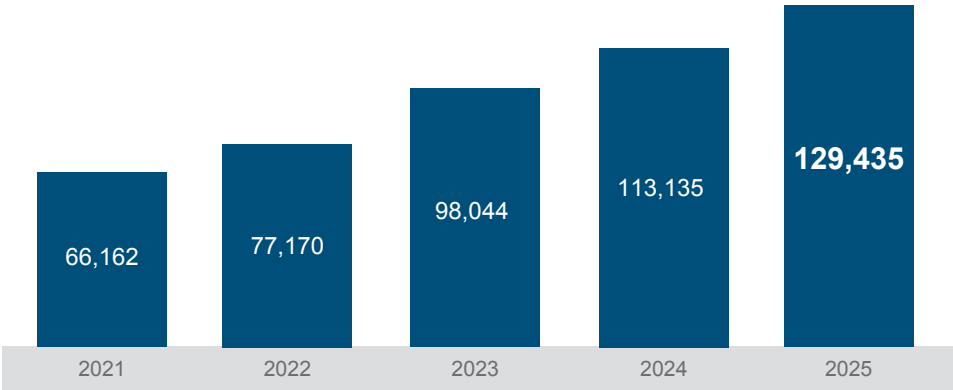
Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Number of kilometers of installed fiber optic cable

The graph shows a sustained and accelerating growth trend in Costa Rica's telecommunications infrastructure, where fiber optic installation nearly doubled in just five years, rising from 66,162 km in 2021 to a 129,435 km by 2025. The most significant leap is observed starting in 2023, reflecting massive and prioritized investment by operators to modernize national networks. This deployment is essential for the country, as it not only improves Internet speed and stability for households but also strengthens the technological foundation needed to support the digital economy, remote work, and the future implementation of advanced services such as 5G.

The technological foundation needed to support the **digital economy, remote work**, and the future implementation of advanced services such as the **5G network** is being consolidated.

GRAPH NO. 04
COSTA RICA: Kilometers of optical fiber in operation.
2021-2025

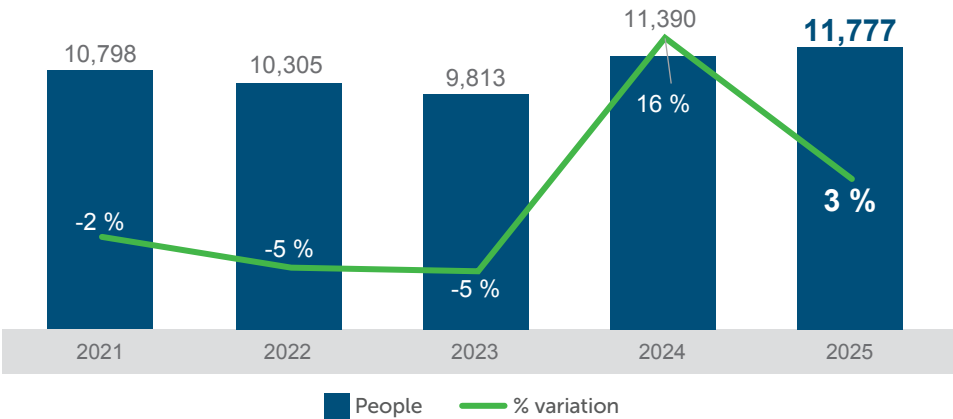


Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Telecommunications Sector Workforce

The graph illustrates a vigorous recovery and expansion of the workforce in Costa Rica’s telecommunications sector following an initial period of contraction. Between 2021 and 2023, the sector experienced a cumulative reduction in its workforce, reaching a low of 9,813 individuals; however, 2024 marked a critical turning point with exponential growth of 16%, the highest rate of the period. This upward trend solidified by 2025, reaching a peak of 11,777 jobs, suggesting that investment in infrastructure (such as the fiber-optic networks mentioned in previous analyses) is driving the creation of direct jobs, strengthening the country’s competitiveness, and stabilizing the sector as a driver of formal and specialized employment.

GRAPH NO. 05
COSTA RICA: Telecommunications Sector Workforce, 2021 - 2025
(yearly figures)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

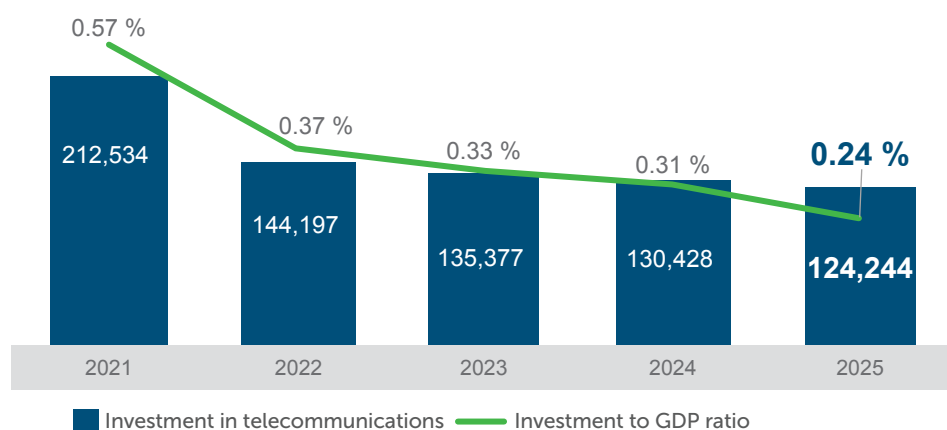


Total Investment in the Telecommunications Sector

The graph reflects a phase of normalization and resource optimization in Costa Rica's telecommunications sector, following the historic investment effort made in 2021 (0.57% of GDP) to strengthen networks during the health emergency. The transition toward an investment level of 0.24% of GDP by 2025 does not necessarily indicate a setback, but rather the completion of major basic infrastructure deployments, allowing companies to move from a phase of massive construction to one of maturation and efficient management of their assets. This trend suggests that the country already has a solid technological foundation, allowing the sector to maintain its operations and quality of service with more strategic and targeted levels of capital, aligning with a market that seeks long-term sustainability after having achieved key milestones in national connectivity.

GRAPH NO. 06
COSTA RICA: Total Investment in the Telecommunications Sector as a Percentage of GDP, 2021–2025

(yearly figures in percentage terms)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Penetration of fixed telephony, fixed Internet, and subscription TV services at the household level

This segment reflects a profound transformation in the technological infrastructure of Costa Rican households:

- **Fixed Internet:** This is the indicator with the most positive performance, establishing itself as an essential service. By 2025, it will reach a penetration rate of 71% of households, meaning that 7 out of every 10 households will have their own connection, driven primarily by the deployment of fiber-optic networks.
- **Subscription TV:** It shows a stabilizing trend with a slight downward adjustment in penetration per household, standing at 43% by 2025. This decline (from 51% in 2021) suggests that families are migrating from traditional television to independent streaming platforms.
- **Fixed Telephony:** Although overall penetration stands at around 32% of households, the data show an internal technological shift: traditional copper-wire telephony has fallen to 15%, while Internet-based telephony (VoIP) is now the modern standard in residential service packages.

Penetration of mobile telephony and mobile Internet services per Capita

The mobile market in Costa Rica has reached levels of maturity and saturation that exceed the regional average:

- **Mobile Telephony:** Penetration per capita remains at an impressive 137% in 2025. This indicates that, on average, each Costa Rican has more than one active line. The most significant change here is the preference for postpaid plans, which now account for 56% of all lines in the country, displacing the prepaid model.
- **Mobile Internet:** Subscription penetration reached 106% per capita. Costa Rica has surpassed the milestone of having more mobile Internet connections than people, reflecting that mobile data access is the primary means of communication and access to information for the nation's population.

TABLE NO. 01
COSTA RICA: Summary of performance indicators for the Costa Rican telecommunications sector. 2021-2025

Indicator	2021	2022	2023	2024	2025
Sector's aggregate data					
Total revenue (in millions of colones)*	880,503	878,211	884,709	923,049	935,734
Total revenue/GDP (in percentage terms)	2.36 %	2.26 %	2.16 %	2.16 %	1.81 %
Total investment/GDP (in percentage terms)	0.6 %	0.4 %	0.3 %	0.3 %	0.2 %
Total human resource employed	10,798	10,305	9,813	11,390	11,777
Total number of human resources under employment/Total economically active population	0.44 %	0.42 %	0.43 %	0.48 %	0.50 %
Fixed telephony					
Total Subscriptions	500,550	488,582	629,688	608,667	599,354
Total subscriptions/100 inhabitants	10 %	9 %	12 %	11.5 %	11.5 %
Total subscriptions/100 households	30 %	28 %	35 %	34 %	32 %
Total Plain Old Telephone Service [POTS] Subscriptions	443,684	410,454	362,023	321,465	278,270
Total POTS subscriptions/100 inhabitants	8.6 %	7.9 %	6.9 %	6.1 %	5.4 %
Total POTS subscriptions/100 households	27 %	24 %	20 %	18 %	15 %
Total VoIP subscriptions	56,866	78,128	267,665	287,202	321,084
Total number of public payphones	2,905	2,683	2,454	1,790	1,414
Mobile telephony					
Total Subscriptions	7,126,859	6,937,543	6,817,288	6,977,935	7,121,629
Prepaid subscriptions	4,431,924	3,935,108	3,633,131	3,531,905	3,143,519
Postpaid subscriptions	2,694,935	3,002,435	3,184,157	3,446,030	3,978,110
Total subscriptions/100 inhabitants	138 %	133 %	130 %	132 %	137 %
Prepaid subscriptions/Total subscriptions	62 %	57 %	53 %	51 %	44 %

Continued on the next page

Indicator	2021	2022	2023	2024	2025
Postpaid subscriptions/Total subscriptions	38 %	43 %	47 %	49 %	56 %
Data transfer					
Total Internet subscriptions	5,963,705	6,107,615	6,333,378	6,510,236	6,818,343
Total number of fixed Internet service subscriptions	1,058,767	1,105,670	1,149,924	1,194,638	1,328,543
Total number of fixed (wired) Internet service subscriptions	1,053,097	1,098,532	1,143,169	1,162,162	1,284,844
Total number of fixed (wireless) Internet service subscriptions	5,670	7,138	6,755	32,476	43,699
Total mobile Internet subscriptions	4,904,938	5,001,945	5,183,454	5,315,598	5,489,800
Total fixed Internet service subscriptions/100 inhabitants	20.5 %	21.2 %	21.9 %	22.6 %	25.6 %
Total fixed Internet service subscriptions/100 households	64 %	64 %	65 %	66 %	71 %
Total mobile Internet service subscriptions/100 inhabitants	95 %	96 %	99 %	100 %	106 %
Total mobile Internet service subscriptions/Total mobile telephony subscriptions	69 %	72 %	76 %	76 %	77 %
Total number of dedicated line connections	14,081	14,243	13,281	12,962	13,956
Pay television					
Total subscriptions	848,950	831,579	819,064	798,828	811,482
Total subscriptions/100 inhabitants	16 %	16 %	16 %	15 %	16 %
Total subscriptions/100 households	51 %	48 %	46 %	44 %	43 %
Reference indicators					
Total population	5,163,038	5,213,362	5,262,225	5,290,037	5,191,823
Gross Domestic Product at current market price (in millions of colones)**	37,256,836	38,843,177	40,938,205	42,755,147	51,812,301
Total households	1,650,361	1,722,602	1,778,254	1,808,710	1,873,372

* These figures include revenue from the subscription television service.

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

Source: SUTEL, General Directorate of Markets, INEC & BCCR, Costa Rica, 2025.



FIXED TELEPHONY

Subscriptions

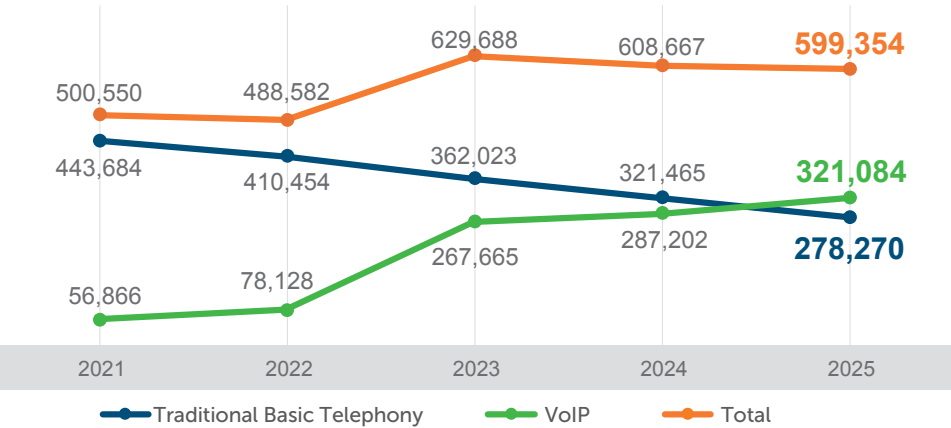
Indicators regarding fixed telephony subscriptions between 2021 and 2025 reveal that the service is undergoing an internal transformation. The sustained decline in plain old telephone service coexists with significant growth in VoIP, indicating that demand for fixed-line voice services persists, albeit through different technological modalities aligned with IP networks. This trend is consistent with a mature market, where technologies are being replaced without the service being completely abandoned.



VoIP subscriptions exceeded **320,000** by 2025

From a structural perspective, the increase in VoIP’s market share by 2025—54% compared to 46% for plain old telephone service—suggests that fixed telephony is becoming increasingly integrated into converged telecommunications offerings, particularly those associated with IP-based services.

GRAPH NO. 07
COSTA RICA: Total telephone service subscriptions by technology, 2021–2025
(yearly figures)

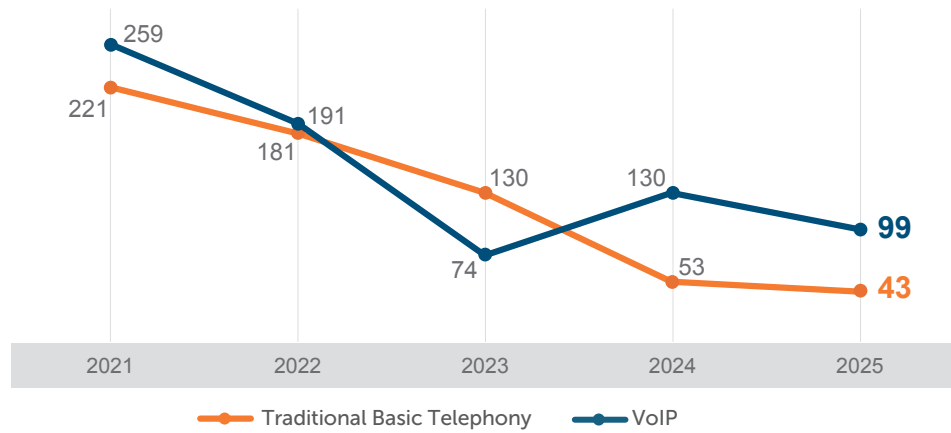


Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Traffic

Total traffic trends show a sustained 61% reduction in aggregate service usage over the analyzed period, pointing to profound changes in users’ communication habits. However, this decline is not distributed evenly across technologies, suggesting a shift in usage toward more efficient and flexible platforms, particularly in the case of VoIP. This trend is consistent when analyzing average traffic per subscriber, which shows that the fixed telephone service is no longer a heavy-use communication medium but has assumed a more specialized role.

GRAPH NO. 08
COSTA RICA: Average traffic per fixed-line subscriber by technology,
2021–2025
 (yearly figures)

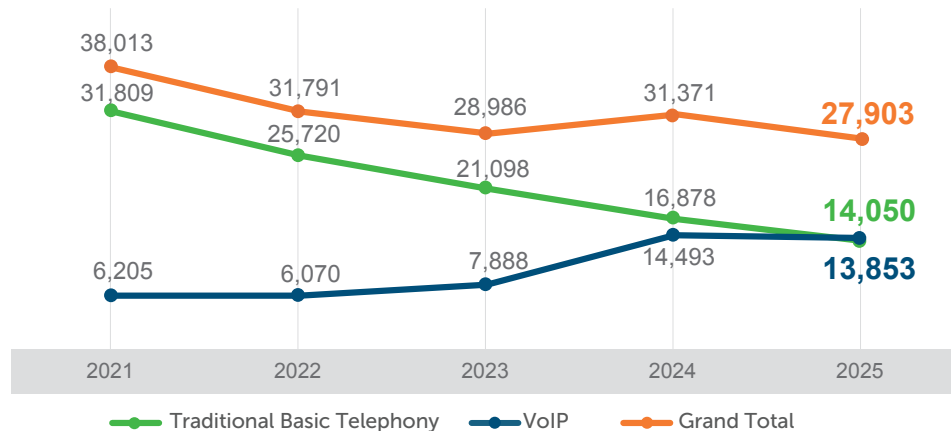


Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Revenue

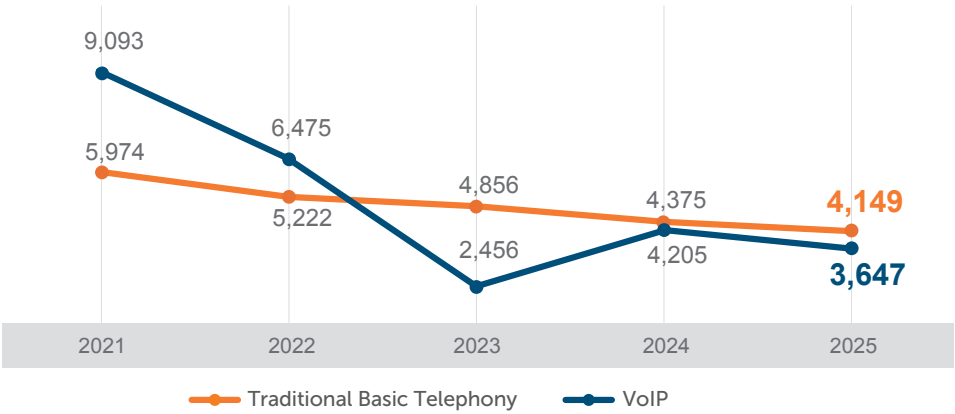
In terms of revenue, the results indicate a process of economic adjustment for the fixed telephone service, marked by a decline in revenue from plain old telephone service and an increase in VoIP revenue. This trend suggests that, although the service continues to generate significant revenue, its ability to sustain traditional rate structures has weakened in an environment of increased competition and technological substitution.

GRAPH NO. 09
COSTA RICA: Total fixed telephone service revenue by technology,
2021–2025
 (yearly figures in millions of colones)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

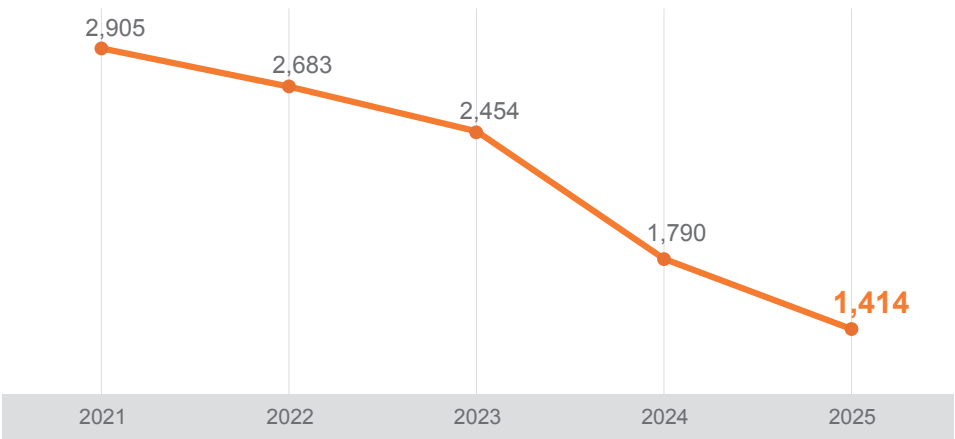
GRAPH NO. 10
COSTA RICA: Average fixed-line subscriber revenue by technology, 2021–2025
(yearly figures in colones)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

The evolution of public telephony in Costa Rica demonstrates a sustained decline in functional relevance, consistent with changes in patterns of access to communication services in general. Between 2021 and 2025, the number of public payphones in operation decreased by 51%. This decline suggests that this service has lost its relevance as a mechanism for ensuring universal access, as it is progressively being replaced by the high penetration of mobile telephony and Internet access services.

GRAPH NO. 11
COSTA RICA: Number of public payphones, 2021-2025
(figures as of December of each year)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.



MOBILE TELECOMMUNICATIONS

Mobile telecommunications services allow users to make calls to mobile or fixed lines, send messages, and access the Internet wirelessly via a cell phone. This section focuses on the following services:

1. **Mobile telephony:** This includes both domestic and international calls and messages.
2. Roaming
3. **Mobile Internet**

Mobile Telephony

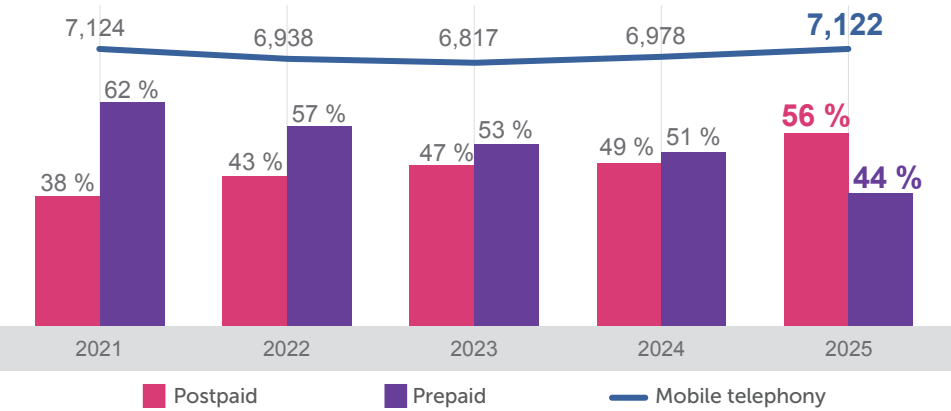
Subscriptions

The profile of Costa Rican subscribers has shifted toward the consolidation of postpaid plans; by the end of 2025, the majority of users had postpaid subscriptions, reaching 56% (a situation not seen since 2011), as prepaid plans had predominated since the sector's opening.

In 2025, the postpaid segment is well established, with **56%** of subscribers using this payment method

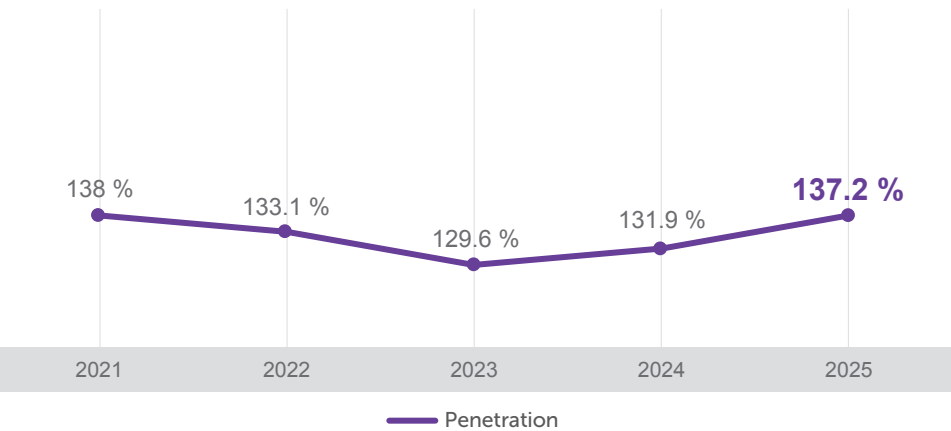
Furthermore, the mobile telephony market is considered mature, as its penetration rates exceed 100% and have remained relatively stable at around 134%. These figures suggest that competition is no longer focused on acquiring new users, but rather on retaining them and attracting them away from other operators through quality service and consumer benefits.

GRAPH NO. 12
COSTA RICA: Mobile telephony subscriptions, 2021 -2025
(yearly figures in thousands and in percentage terms)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

GRAPH NO. 13
COSTA RICA: Mobile telephony service subscribers per 100 inhabitants, 2021-2025
(yearly figures in percentage terms)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Market Dynamics

In the mobile phone service sector, no single operator holds a dominant position, as in 2021, Kölbi led with 42.4% of subscriptions, while by the end of 2025, Liberty

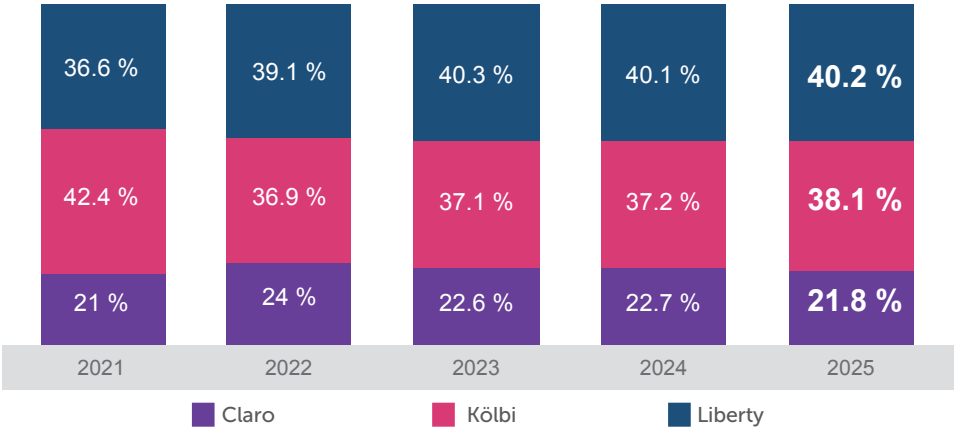
led the market with a 40.2% share—a position it has consolidated since 2022—but is closely followed by Kölbi with a 38.1% share. This distribution of market shares suggests aggressive competition, in which the offering of convergent services and commercial innovation have been key factors in attracting customers.

The Herfindahl-Hirschman Index (HHI) reflects a highly concentrated market that remains in an almost static equilibrium, as values hover around 3,500 points. This stability in the HHI, along with the shifting rankings among operators, indicates that the current dynamism does not stem from the entry of new competitors but rather from a constant struggle to retain and acquire subscribers within an already mature market.



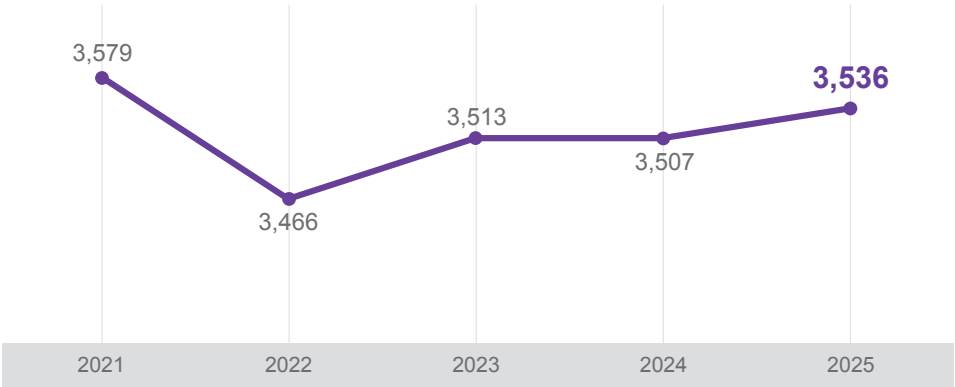
The current dynamism in the mobile phone industry does not stem from the entry of new competitors, but rather from a **constant struggle to retain** and attract subscribers in a **now mature market**

GRAPH NO. 14
COSTA RICA: Distribution of mobile phone subscriptions by operator, 2021–2025
(yearly figures in percentage terms)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

GRAPH NO. 15
COSTA RICA: Evolution of the HHI per year, 2021-2025
(yearly figures)



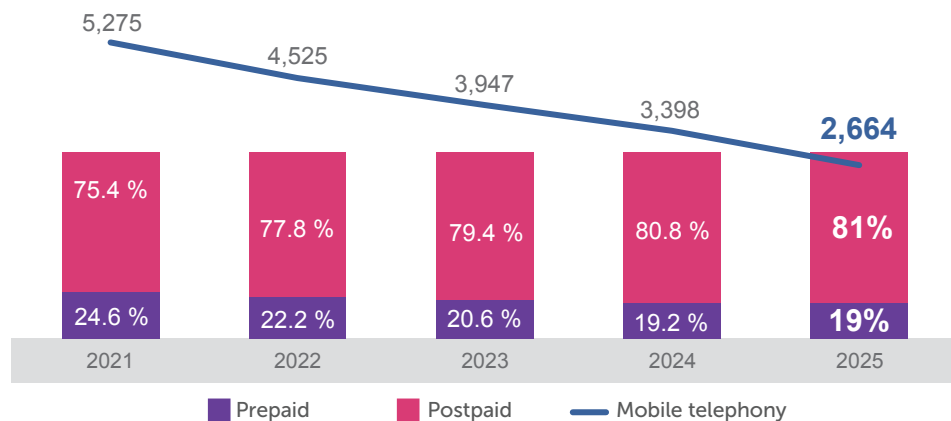
Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Traffic

There is evidence of a significant shift in user behavior with regard to traditional voice communication, as traffic has been cut in half over a five-year period. This trend is particularly pronounced in the postpaid segment, where the monthly average of minutes per user fell from 123 in 2021 to 45 in 2025. The downward trend in traditional mobile voice does not imply a decrease in communication, but rather a possible shift in user behavior.

SMS traffic shows steady growth, suggesting that SMS has found a niche for survival; this increase is not necessarily driven by interpersonal communication but rather by its establishment as an essential tool for security and notifications—such as the use of text messages for two-factor authentication (2FA), banking alerts, and institutional notifications, among others.

GRAPH NO. 16
COSTA RICA: Distribution of total voice traffic associated with mobile phone service by payment method*, 2021-2025
 (figures in millions of minutes and in percentage terms)

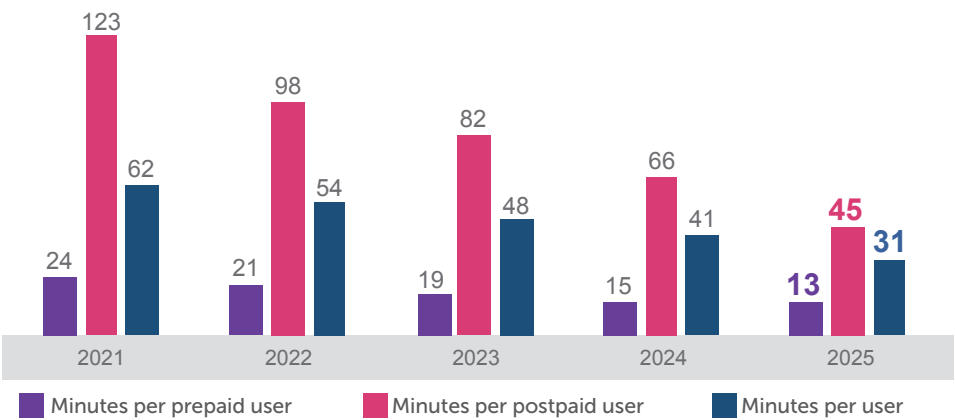


* Only includes national and international voice minutes; excludes roaming.

Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

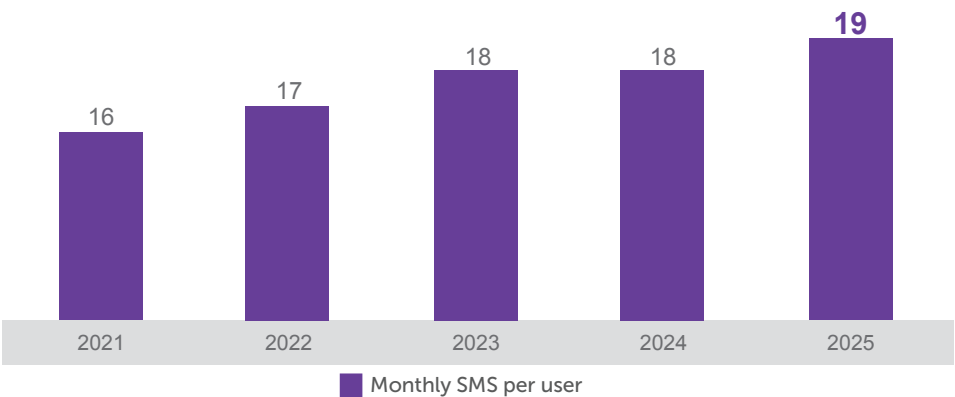
The downward trend in
traditional mobile voice service
 does not imply a decline in
 communication, but rather a
 possible shift in user behavior

GRAPH NO. 17
COSTA RICA: Average monthly voice traffic of mobile telephone service* per subscriber according to payment method, 2021-2025
(figure in minutes per subscriber per month)



* Includes domestic and international voice call minutes only; excludes roaming.
Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

GRAPH NO. 18
COSTA RICA: Average monthly SMS traffic associated with mobile phone service*, 2021–2025
(figures in number of messages per month)



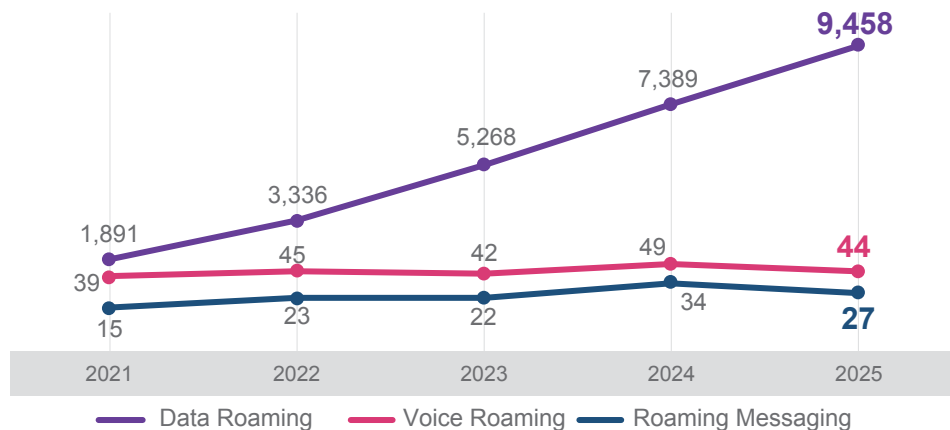
* Includes messages sent domestically and internationally; excludes roaming.
Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Roaming

Roaming services reveal an expansion in data consumption (increasing nearly fivefold, from 1,891 TB in 2021 to 9,458 TB), while voice and messaging traffic remain at low and relatively stable levels. This asymmetry confirms that users worldwide have replaced traditional voice and messaging services with data solutions, opting for the versatility of IP messaging and Internet-based calls—a shift that redefines roaming not necessarily as a telephony service, but as a critical source of global mobile broadband.

GRAPH NO. 19 COSTA RICA: Total and percentage distribution of roaming traffic by type, 2021–2025

(voice in millions of minutes, messaging in millions of messages, and data in TB)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

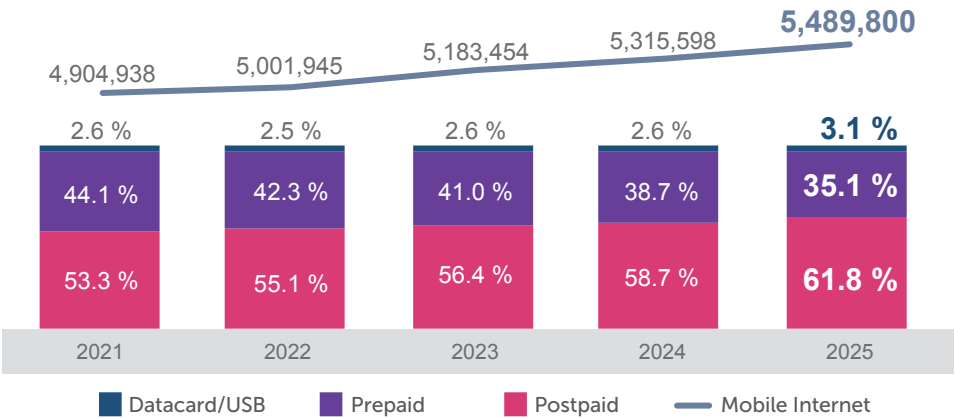
Mobile Internet

Subscriptions

Mobile Internet service in Costa Rica has evolved from being a value-added service within mobile telecommunications to becoming a pillar of national connectivity. With a penetration rate of 105.7% in 2025, the country has surpassed the universal access threshold (100% penetration), suggesting an environment where the majority of the population has at least one means of accessing the network. This sustained growth, totaling nearly 5.5 million subscriptions at the end of the period, reflects a demand that is increasingly digitized and reliant on mobility for social and economic interaction.

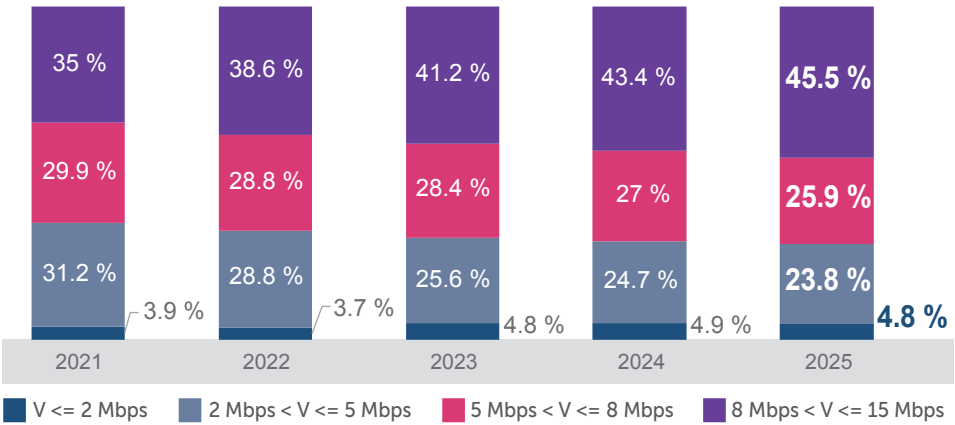
This increasingly digital demand has been characterized by a search for higher service standards, as the market has seen a notable shift toward higher speeds (8 Mbps to 15 Mbps), which rose from 35% in 2021 to 45.5% in 2025, demonstrating an improvement in the end-user experience. At the same time, the postpaid segment has grown stronger, reaching 61.8% of the market. These structural changes not only demonstrate the sector's maturity but also point to a clear direction toward a more demanding digital ecosystem, where speed and service continuity are the new pillars of value for Costa Rican subscribers.

GRAPH NO. 20
COSTA RICA: Mobile Internet subscriptions, by payment method and access device, 2021–2025
(yearly figures in totals and percentages)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

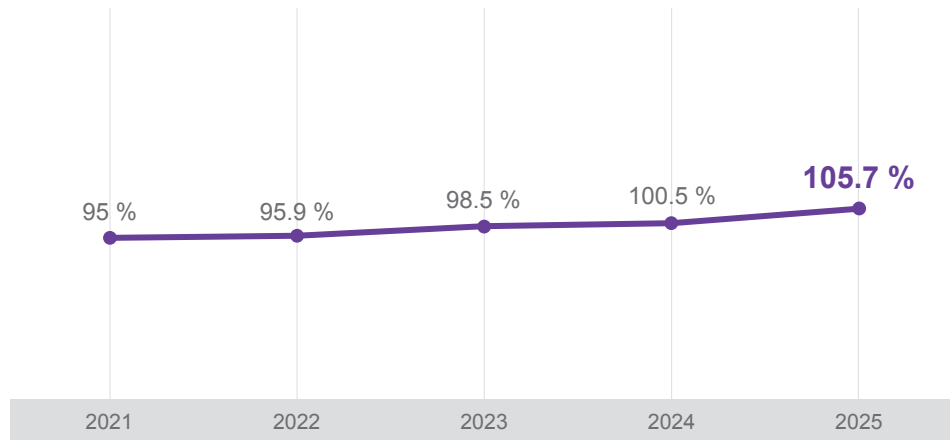
GRAPH NO. 21
COSTA RICA: Mobile Internet subscriptions. Percentage breakdown by speed, 2021–2025
(yearly figures in totals and percentages)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

The service has seen a significant shift toward higher speeds (8 Mbps to 15 Mbps), which rose from 35% in 2021 to **45.5%** in 2025

GRAPH NO. 22
COSTA RICA: Mobile Internet subscriptions per 100 inhabitants,
2021-2025
 (year-end figures)



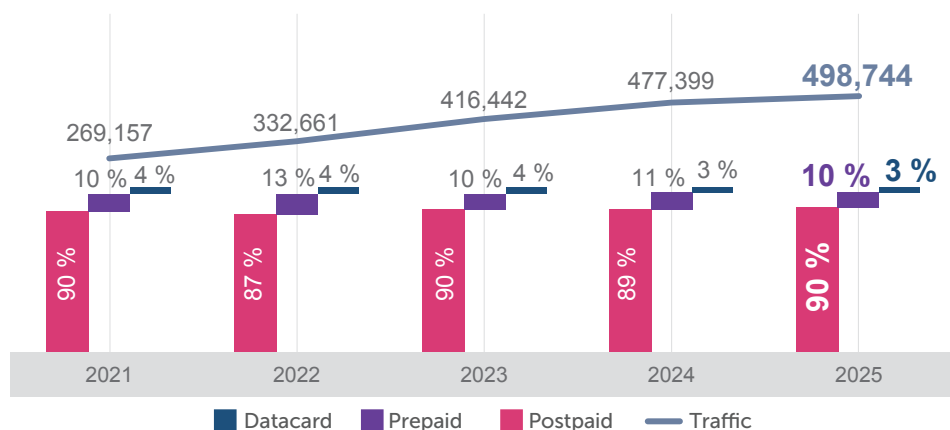
Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Traffic

Mobile Internet traffic shows a steady increase, driven primarily by postpaid subscribers (90% of mobile Internet traffic in 2025), rising from 269,157 TB in 2021 to 498,744 TB in 2025.

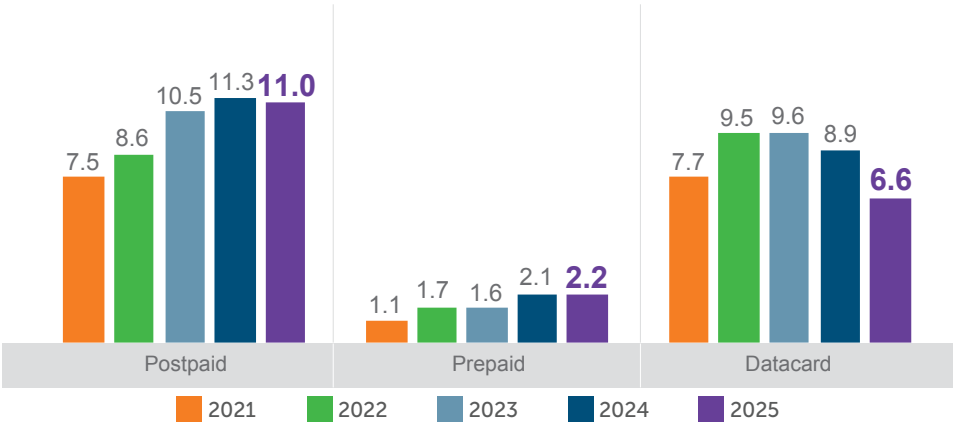
However, data on average consumption suggest a maturing of usage patterns, where, following several years of sustained growth, the average per user is beginning to show signs of stabilization, at around 11 GB per month for postpaid users and 2 GB for prepaid users. These trends paint a picture in which mobile Internet service has ceased to be a novelty and has become a daily necessity for the population.

GRAPH NO. 23
COSTA RICA: Traffic, mobile Internet access, 2021–2025
 (yearly figures in TB)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

GRAPH NO. 24
COSTA RICA: Internet traffic on the mobile network, average traffic per user for each payment method and on data cards, 2021-2025
(figures in GB per user per month)



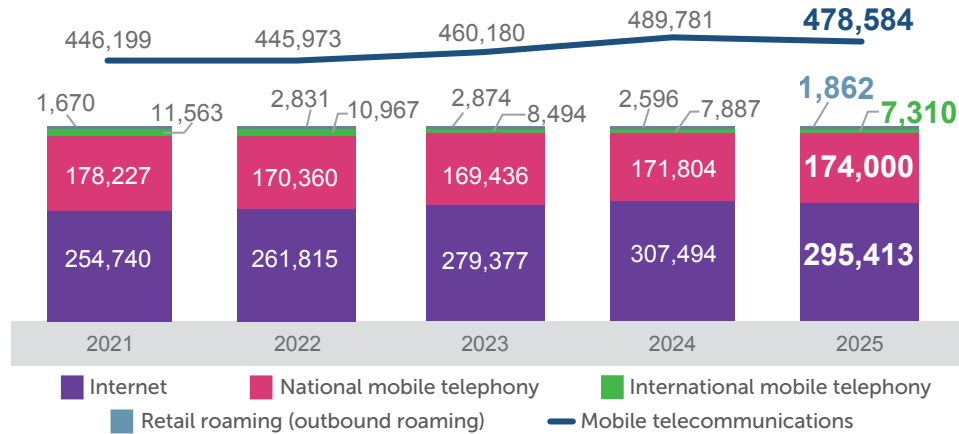
Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Mobile Telecommunications Revenue

The data reveals that the Internet has established itself as the fundamental pillar supporting revenue in the mobile telecommunications sector. While revenue from mobile telephony (domestic and international) remains relatively stable, Internet revenue has maintained sustained growth, reaching 295,413 million colones in 2025. This trend indicates that total revenue no longer comes primarily from voice services but rather from the ability to monetize data traffic, offsetting the decline in traditional voice services and allowing the market's total revenue to remain resilient at levels close to the 478,584 million colones reached in 2025.

In addition, there is an increasingly pronounced gap in average revenue per user (ARPU) between the different payment models; while postpaid plans recorded a slight decline in 2025 to 8,849 colones, their ARPU remains significantly higher (nearly six times higher) than that of prepaid plans, which has fallen to 1,490 colones. This disparity underscores the importance of this payment method, demonstrating that, despite market saturation, the stability of total revenue depends on the loyalty of users who opt for contracts, in contrast to a prepaid market that is becoming increasingly smaller in terms of individual economic contribution.

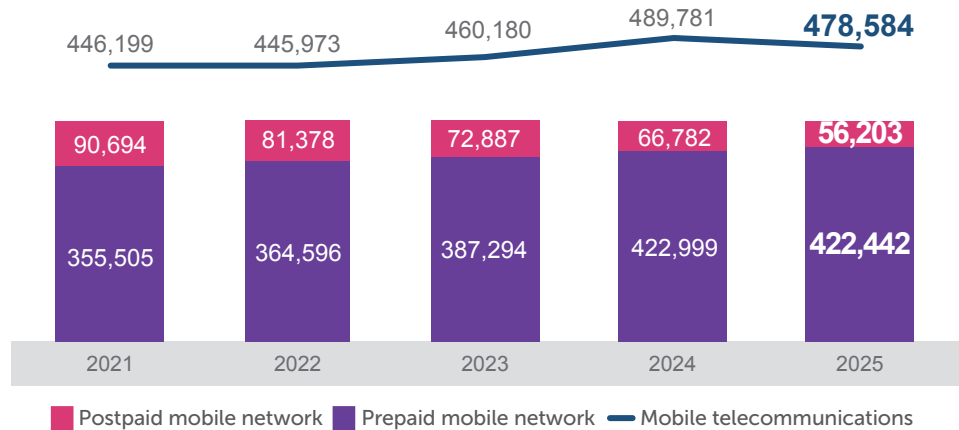
GRAPH NO. 25
COSTA RICA: Breakdown of total revenue from mobile telecommunications by service*, 2021–2025
 (yearly figures in millions of colones)



* Includes domestic and international mobile phone service, roaming, and data.

Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

GRAPH NO. 26
COSTA RICA: Breakdown of total revenue from mobile telecommunications* by payment method, 2021–2025
 (yearly figures in millions of colones)

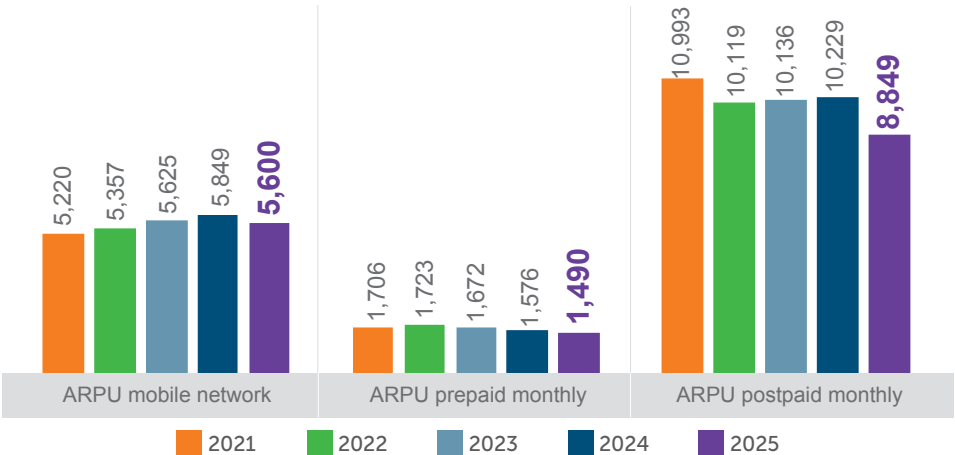


* Includes domestic and international mobile phone service, roaming, and data.

Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

The Internet has established itself as **the cornerstone of revenue** in the mobile telecommunications sector.

GRAPH NO. 27
COSTA RICA: Average monthly revenue per user (ARPU)* for mobile telecommunications by payment method, 2021–2025
(figures in colones per month)



* Average revenue per user (ARPU) includes revenue from outgoing and incoming domestic and international mobile voice calls, domestic and international SMS/MMS, outgoing roaming, and mobile data.

Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.





DATA TRANSFER

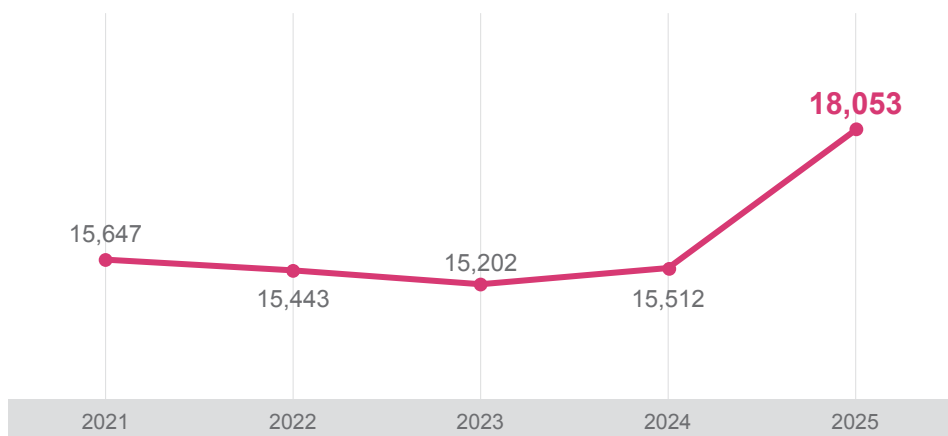
Retail Service

The year 2025 marks a positive turning point for the fixed-line retail Internet service, as the market's average revenue is growing at a double-digit rate, reaching year-over-year growth of 16.38%. This stands out when compared to the previous growth trend, which hovered around $\pm 2\%$.

This shift in the ARPU (average revenue per user) trend reflects a combination of multiple factors, including demand and changes in its composition, technological migrations, higher speeds, and improvements in service quality.

GRAPH NO. 28
COSTA RICA: Average revenue per fixed Internet subscriber, 2021–2025

(figures in colones per month)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

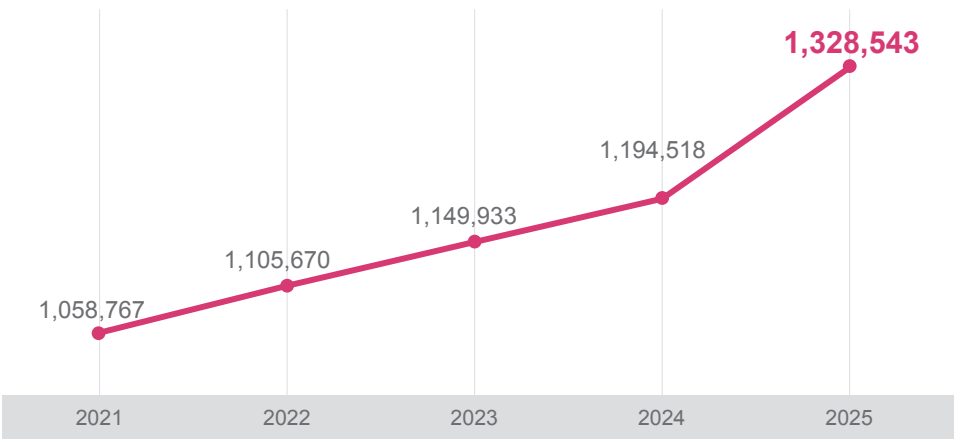
GRAPH NO. 29
COSTA RICA: Revenue from fixed Internet service, 2021–2025
(yearly figures in millions of colones)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

In line with the above, and considering that annual revenue from fixed Internet service grew by 26.65% in 2025 compared to the previous year, it is essential to analyze the data on subscribers¹ (which increased by 11.22% in 2025). While both revenue and subscriptions show an upward trend, the reality is that demand is growing at a more moderate pace.

GRAPH NO. 30
COSTA RICA: Fixed Internet service subscriptions, 2021–2025
(yearly figures)



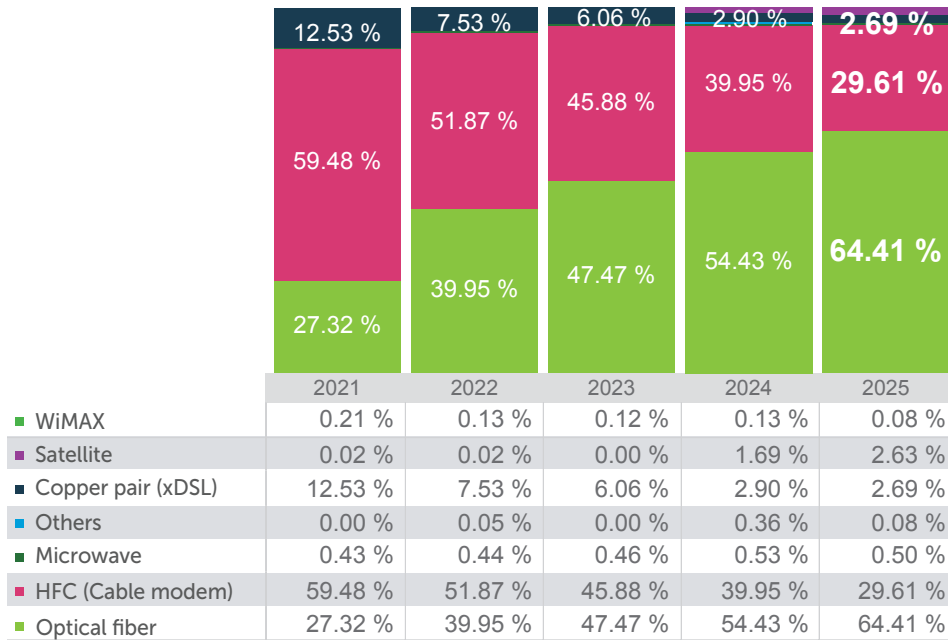
Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

An analysis of subscription trends by technology reveals a clear shift in consumer preferences in terms of how they sign up for fixed Internet service: subscriptions for Internet access via HFC networks decreased by 17.56% in 2025 compared to the previous year, while subscriptions for the same service via fiber-optic networks increased by 31.61%.

¹ One operator made adjustments to the indicator for subscriptions for 2025.

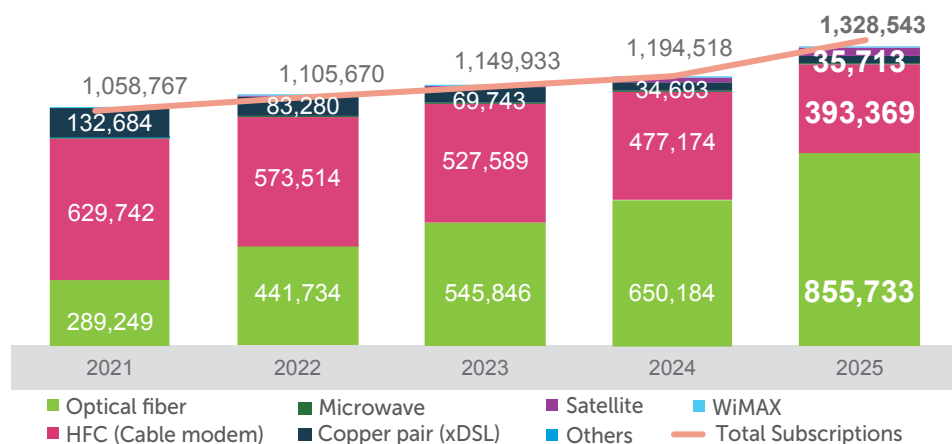
Even though satellite networks still account for a relatively small share of total fixed Internet service subscriptions, it is worth noting their growth through 2025, as subscriptions via this channel grew by 73.28% compared to the previous year.

GRAPH NO. 31
COSTA RICA: Fixed Internet subscriptions by technology,
2021-2025
 (figures in percentage terms)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

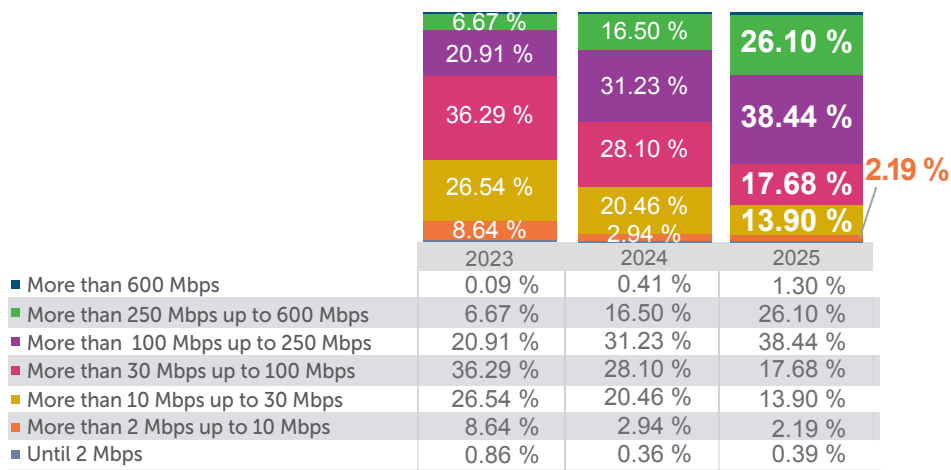
GRAPH NO. 32
COSTA RICA: Fixed Internet subscriptions by technology,
2021-2025
 (yearly figures)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

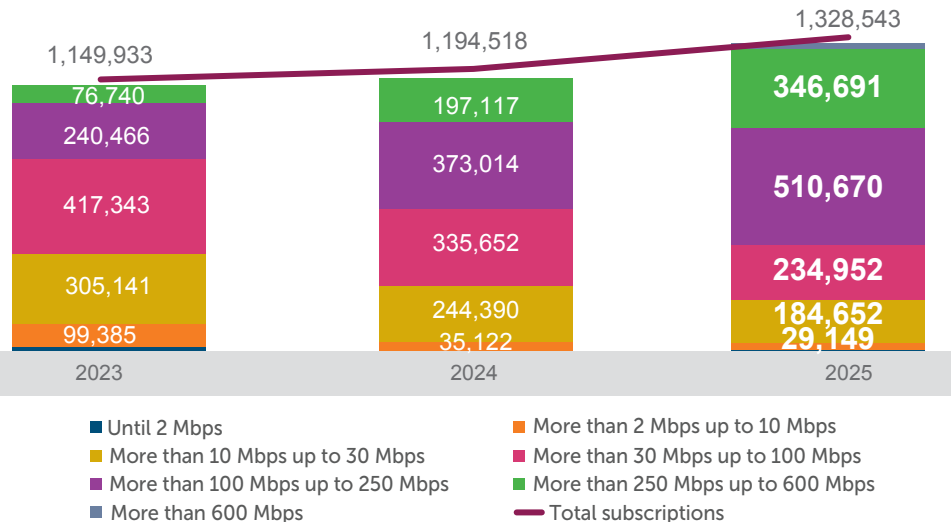
Continuing with the analysis of consumer demand for this product, by 2025 there will also be a shift in the contracted speeds for fixed Internet service, with higher-speed ranges taking center stage. The speed ranges of over 100 Mbps up to 250 Mbps and over 250 Mbps up to 600 Mbps account for 64.53% of fixed Internet service subscriptions, with year-over-year growth rates of 36.90% and 75.88%, respectively.

GRAPH NO. 33
COSTA RICA: Fixed Internet subscriptions by speed,
2021-2025
(figures in percentage terms)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

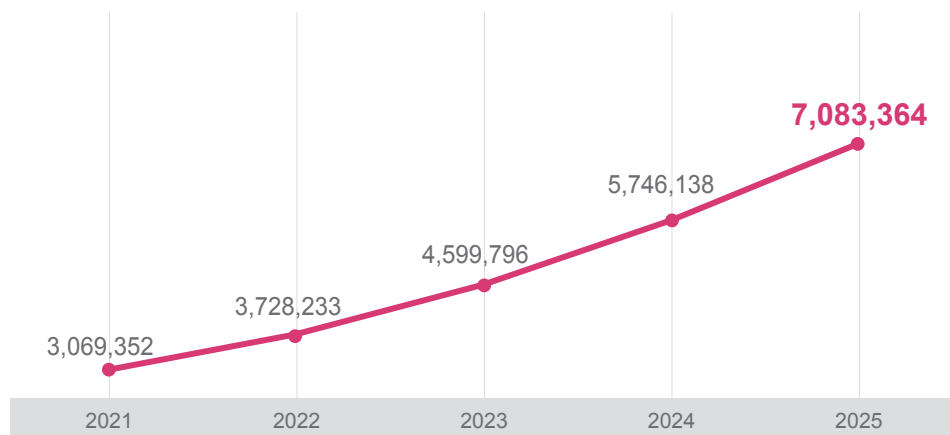
GRAPH NO. 34
COSTA RICA: Fixed Internet subscriptions by speed,
2021-2025
(yearly figures)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Finally, in terms of traffic² for this service, this metric continues to grow at a rate similar to previous years; by 2025, traffic had increased by 23.27% compared to 2024. This sustained upward trend is consistent with the changing demands observed among users of this service, who are seeking higher speeds and more modern connection methods.

GRAPH NO. 35
COSTA RICA: Fixed Internet traffic, 2021-2025
 (yearly figures in TB)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

The trend observed for 2025 indicates a shift in demand, characterized primarily by a migration toward higher-capacity technologies and the adoption of faster speeds. This phenomenon suggests a transition toward higher-value consumption, consistent with users' increased demands for quality and capacity.

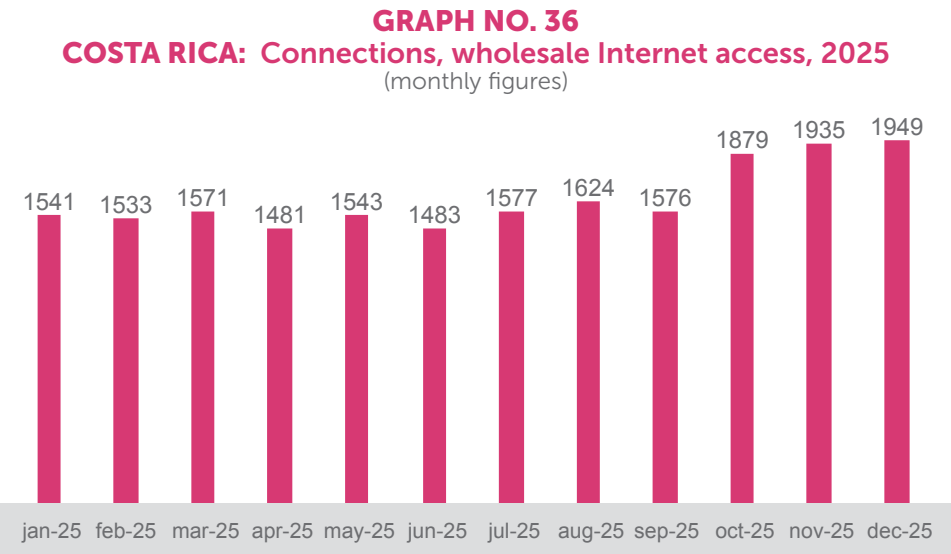
² One operator made adjustments to the traffic indicator for 2024.

The fixed retail Internet service is undergoing a restructuring of demand, characterized primarily by a **shift toward higher-capacity technologies** and the **adoption of higher speeds**

Wholesale Service

Graph no. 36 shows the monthly trend in the total number of wholesale connections during 2025. Industry data reflect sustained growth in the number of wholesale connections, with a 26% increase between January and December. This reflects a market dynamic in which smaller or regional operators are demanding greater Internet capacity to serve their end customers. According to data collected in 2025, most of these connections are provided via high-capacity technologies such as fiber optics; however, microwave connections were also recorded, suggesting that demand exists even in remote areas or those with very low population density. The 1,949 wholesale connections also reflect the country’s varied geography, which requires different types of connections across various regions.

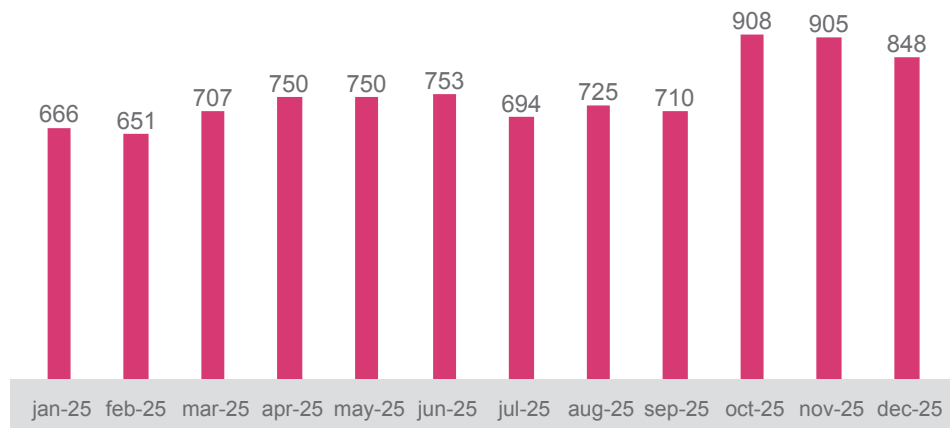
2.2% average monthly increase
in wholesale connections
during 2025



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Figure no. 37 illustrates the monthly trend in revenue generated by the wholesale Internet service throughout 2025, in millions of colones. Between January and December, a sustained upward trend is observed, with 27.3% growth that aligns with the increase in the total number of connections. This monthly trend is positive, with no significant seasonal declines; on the contrary, the increase of 198 million colones toward the end of the year confirms the importance of the wholesale market as a key segment in the country’s Internet ecosystem.

GRAPH NO. 37
COSTA RICA: Revenue, wholesale Internet access, 2025
 (monthly figures in millions of colones)

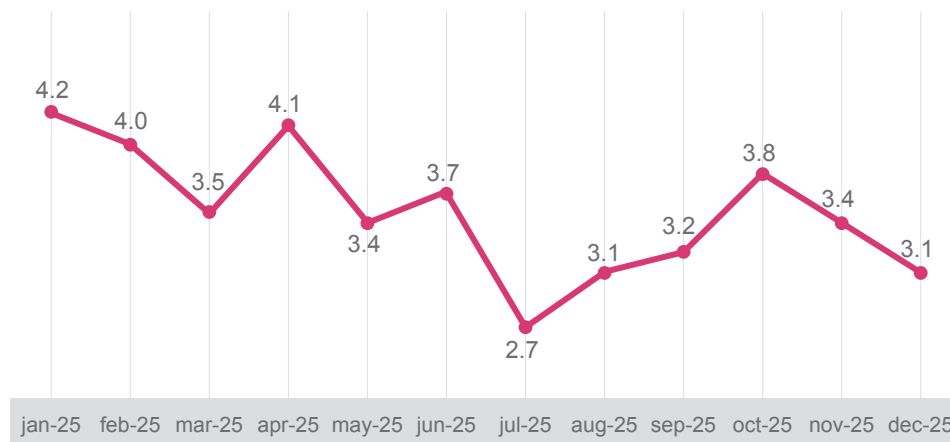


Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Graph no. 38 highlights how revenue per connection in the wholesale Internet segment is concentrated in the highest-speed range—specifically, connections exceeding 1 Gbps. It is noteworthy that, although these connections account for 4.8% of all wholesale connections, they generate 36% of the service's total revenue. This data underscores the high value provided by fiber-optic connections, as well as the need for some providers to have greater backhaul capacity and to ensure reliability and high performance in their service.

2025 ends with average revenue of **3.1 million colones** per wholesale connection with speeds exceeding 1 Gbps

GRAPH NO. 38
COSTA RICA: Revenue per connection of 1 Gbps or more, wholesale Internet access, 2025
 (monthly figures in millions of colones per connection)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Dedicated Lines

Dedicated Lines are a specialized connectivity service that provides direct and exclusive access to telecommunications networks, offering users guaranteed bandwidth, predictable quality of service (QoS), and highly reliable connectivity (point-to-point or point-to-multipoint) without fluctuations caused by network congestion. This service has played a fundamental role in the digital transformation of businesses, especially in sectors that require robust, uninterrupted connectivity, such as the corporate sector.

Currently, telecommunications operators and providers report on this service using two regulatory indicators: subscriptions and revenue, broken down by operator, territory (domestic/international), market type (wholesale/retail), and delivery technology (VPN, links, frames, ports, and other media).

At the end of 2025, the market's connections are led by **four key operators: ICE** with 5,783 connections (31%), **UFINET** with 3,823 (21%), **Telecable** with 2,778 (15%), and **Millicom** with 2,699 (14%)

At the start of 2025, the market had 35 active reporting operators. During the year, mergers and acquisitions reduced this number to 32, as Liberty Telecomunicaciones de Costa Rica merged with Liberty Servicios Fijos and Columbus Networks, while Ideas Gloris acquired Gold Data Costa Rica.

Subscription Trends

The dedicated line service exhibits a highly concentrated territorial structure in the domestic market. During the 2021–2025 period, domestic connections consistently accounted for more than 98% of the total volume, rising from 17,944 connections in 2021 to 18,135 in 2025, representing a +1.1% increase. At the same time, international connections experienced a contraction of -4.9%, decreasing from 349 to 332 connections, reflecting a sustained decline in this segment.

The dedicated line offering is structured around five service delivery technologies, each targeting specific segments of corporate demand.

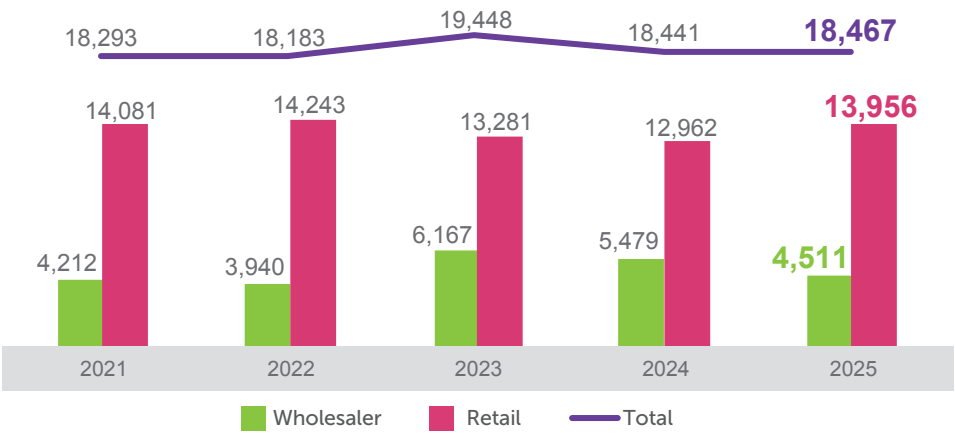
VPNs (virtual private networks) **lead in absolute volume**, although the trend is downward: from 8,117 connections in 2021 (44.4% of the total) to 7,389 in 2025 (40.0%), representing a decrease of -8.9% over the period.

Leased lines (digital and analog) have consolidated their position as the second-largest technology, rising from 5,291 connections (28.9%) in 2021 to 5,983 (32.4%) in 2025—a growth of +13.1% that reflects demand for connectivity with higher dedicated bandwidth.

The “Other Media” category experiences significant volatility, fluctuating between 4,495 and 6,067 connections depending on the year, representing between 24.3% and 31.2% of the volume. Ports show relative growth (from 155 lines in 2021 to 598 in 2025, +286%). Frames (*tramas*, in Spanish) have virtually disappeared from the portfolio, falling from 96 connections in 2021 to just 2 in 2025.

Meanwhile, segmentation by market type shows a consistent predominance of the retail segment. The retail market maintained between 12,962 and 14,243 connections during 2021–2025, representing between 70.1% and 77.1% of total volume. The wholesale market showed greater volatility, peaking at 6,167 lines in 2023 (31.7% of the total) before contracting to 4,511 in 2025 (24.4%), decreased by 26.8%. This wholesale volatility, combined with relative retail stability, suggests that wholesale supply contracts respond to project cycles or the renegotiation of high-volume agreements, while the retail market maintains a more organic base of continuous demand. At the end of 2025, the concentration of retail connections reached 74.8%.

GRAPH NO. 39
COSTA RICA: Number of dedicated line connections in 2021-2025
(yearly figures)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.



Revenue Trends

Revenues from the domestic dedicated-line market contracted by -42.1% during the 2021–2025 period, falling from ₪46.34 billion to ₪26.85 billion. International revenue, although smaller in absolute terms, also contracted by -31.2%, falling from ₪7.56 billion to ₪5.20 billion. The geographic breakdown has undergone a relative rebalancing: the domestic market's share of revenue fell from 86.0% in 2021 to 83.8% in 2025, while the international market's share grew from 14.0% to 16.2%.

In terms of revenue by technology type, VPN dominates in volume (40.0% of connections) and generates 36.9% of revenue (₪11.84 billion in 2025), a decline of 55.2% compared to 2021. Leased lines, although they account for 32.4% of connections, generate 29.6% of revenue (₪9.49 billion), with a contraction of 43.6% since 2021, but showing relative stability in their unit margins.

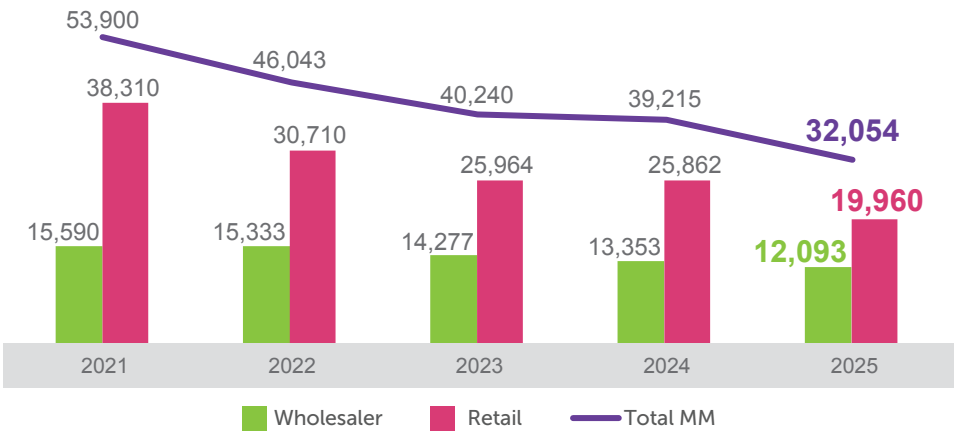
The “Other Media” category shows a slight decrease in connections, from 25.3% in 2021 to 24.3% in 2025, but revenue increases from ₪9.31 billion to ₪9.88 billion (+6.1%), establishing itself as the second-largest revenue source starting in 2023. Ports maintain a marginal but growing share (2.3% of revenue), while Frames accounts for 0.3%. The distribution of revenue by technology reflects a transition from high-subscription VPN models toward lower-volume but higher-value services, consistent with more personalized demands and higher bandwidth requirements.

Retail revenue fell from ₪38.31 billion in 2021 to ₪19.96 billion in 2025 (-47.9%), a contraction twice as steep as the decline in wholesale revenue (-22.4%, from ₪15.59 billion to ₪12.09 billion). Despite the decline in revenue, the retail market continues to dominate in terms of absolute revenue at the end of 2025 with ₪19.96 billion (62.3% of the total), compared to ₪12.09 billion for the wholesale market (37.7%). However, the relationship between the volume of connections and revenue generated shows that the retail segment accounts for 75.6% of connections but generates only 62.3% of revenue, while the wholesale segment, with 24.4% of connections, accounts for 37.7% of revenue.

The simultaneous convergence of territory and distribution channels by the end of 2025 reveals four segments with distinct characteristics. The National-Retail segment has the largest number of connections (13,810 lines, 74.8% of the total) but generates ₪18.25 billion in revenue (56.9% of the total). The Domestic-Wholesale segment, with 4,325 lines (23.4%), generates ₪8.60 billion (26.8%), representing unit revenue approximately 2.8 times higher than that of the domestic retail segment.



GRAPH NO. 40
COSTA RICA: Revenue from dedicated lines in 2021-2025
(yearly figures in millions of colones)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

Finally, the International-Wholesale segment, the smallest in terms of volume (186 lines, 1.0%), generates ₡3.50 billion (10.9% of revenue). The International-Retail segment (146 lines, 0.8%) contributes ₡1.71 billion (5.3%).



SUBSCRIPTION TELEVISION

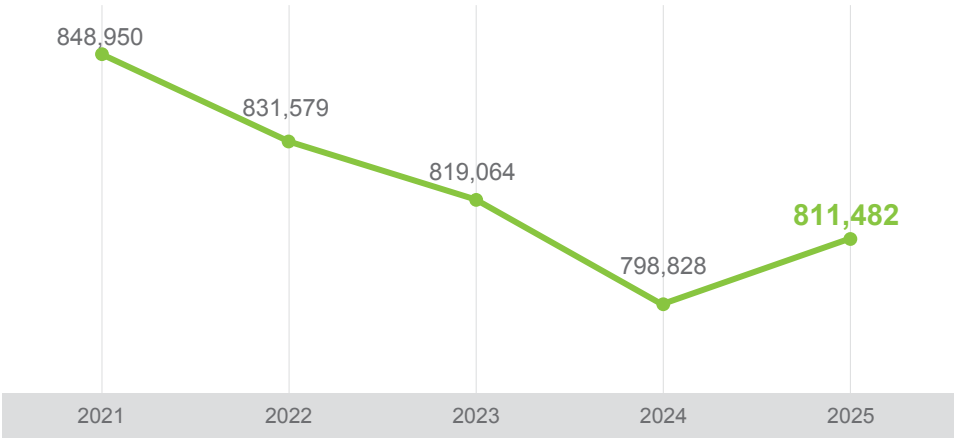
Subscriptions

Between 2021 and 2025, the pay-TV service in Costa Rica is characterized by stability in the total number of subscriptions, although this is accompanied by a significant shift in the technology used by subscribers. As the market undergoes a period of structural realignment, the growth of certain technologies in this context is not driven by market expansion but rather by internal reorganization, typical of a mature and highly penetrated service.

The subscription television market is **evolving toward more efficient technologies** that are aligned with new consumer preferences.

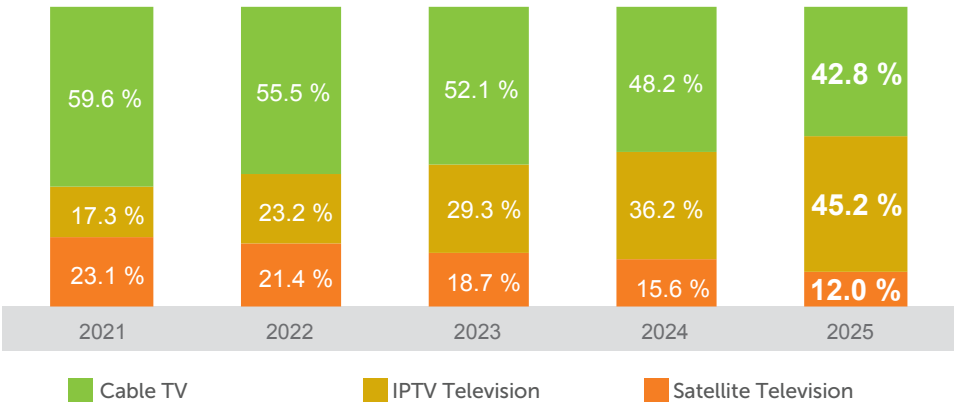
The most significant development during this period is the market's structural shift toward IPTV technology. This technology is experiencing sustained and accelerated growth, both in absolute subscription numbers and in market share. While IPTV accounted for a smaller share of the total in 2021, by 2025 it will have established itself as the technology with the largest market share, exceeding 45% of subscriptions. This trend is consistent with the expansion of broadband networks and subscribers' growing preference for services that are more flexible, integrated, and compatible with other digital content.

GRAPH NO. 41
COSTA RICA: Total pay TV subscriptions in 2021-2025
(yearly figures)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

GRAPH NO. 42
COSTA RICA: Evolution of the market share of pay TV subscriptions per type of technology in 2021-2025
(figures in percentage terms)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

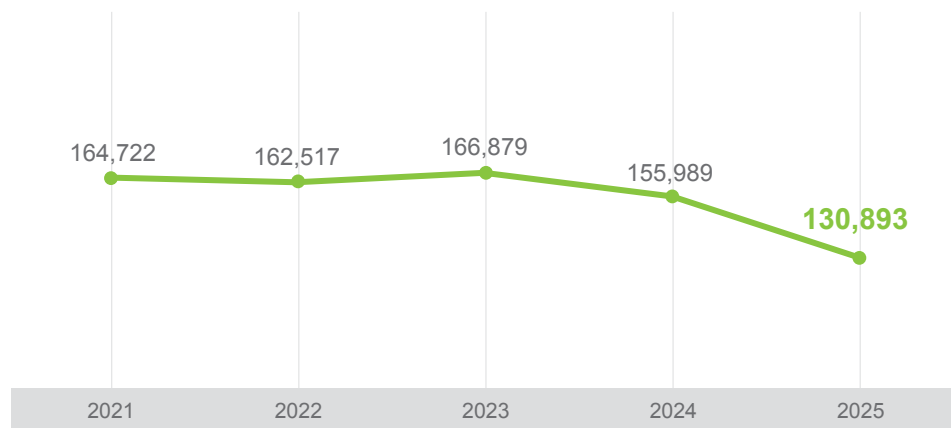
Revenue

From a revenue perspective, the service’s performance shows a clear downward trend over the past five years, reflecting an economic adjustment process affecting both the service and the sector, in which this revenue stream is losing relative importance among subscribers. The sustained decline in total revenue—even amid stable subscription numbers—points to an environment of increased competitive pressure, where operators and providers have less room to pass on costs or maintain traditional pricing structures.

The trend in average revenue per user (ARPU) reinforces this, indicating that the service tends to be positioned as a complementary component within telecommunications bundles, rather than as a primary source of revenue. In this regard, ARPU shows a mixed pattern. Between 2021 and 2023, moderate growth is observed, reaching its highest level in 2023. However, starting in 2024, average revenue per user is considerably lower. This trend suggests that, although the number of subscriptions remains relatively stable, operators or providers are receiving lower revenues.

Taken together, these results indicate that the subscription television service is undergoing a period of technological transformation. While IPTV shows sustained growth in terms of adoption, this progress does not translate into an increase in the sector's total revenue but rather occurs against a backdrop of declining average revenue per subscriber.

GRAPH NO. 43
COSTA RICA: Total revenue from pay TV subscriptions in 2021-2025
 (yearly figures in millions of colones)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.

IPTV has been steadily increasing its market share
 until it now accounts for nearly half of the market.



GRAPH NO. 44
COSTA RICA: Average monthly revenue per subscriber from pay TV subscription services, 2021 - 2025
(monthly figures based on quarterly data in colones per subscriber)



Source: SUTEL, General Directorate of Markets, Costa Rica. 2025.



NETWORK QUALITY AND PERFORMANCE

Number of Blocked Mobile Phones per Year

The Mobile Phone Validation Platform [PVC, per its acronym in Spanish] is a system developed by Sutel to detect and prevent devices reported as stolen, irregular, or tampered with from connecting to mobile networks operating in Costa Rica. Its objective is to fight the trade of these devices by individuals or businesses that attempt to put them back on the market. Anyone in Costa Rica can verify the International Mobile Equipment Identity (“IMEI”) status of their mobile device or one they plan to purchase through the platform’s¹ website.

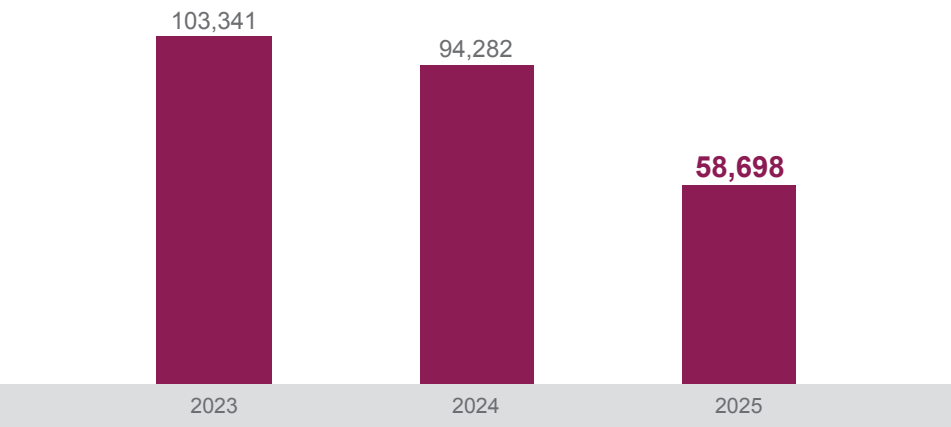
The **Mobile Phone Validation Platform** regulates the stock of connected mobile devices and **contributes to public safety** by discouraging the resale and tampering of stolen mobile phones

The platform became fully operational in 2023 as an improvement over the previous blocking system with the GSM Association, which merely exchanged lists of stolen or lost devices. The PVC has achieved its objective and has made a significant contribution to public safety, as evidenced by the decrease in the

¹ URL: <https://pvc.sutel.go.cr/>

number of devices blocked each year due to robbery/theft and other irregularities. It is worth noting that from 2024 to 2025, there was a 37.7% reduction in the number of blocked devices, representing a total of 35,584 fewer incidents.

GRAPH NO. 45
COSTA RICA: Number of mobile devices (mobile phones) blocked per year (stolen/irregular)



Source: SUTEL, General Directorate of Quality, Mobile Phone Validation Platform, 2025.

Type Approval of Mobile Devices

The type approval of mobile devices in Costa Rica, as defined by Sutel, aims to subject devices intended for sale in the local market to a series of standardized functional and laboratory tests using radio frequency equipment. This ensures their compatibility with national operators’ networks and guarantees their proper functioning.

When a user purchases a **type-approved device**, they can be assured that it will work properly on all mobile networks in Costa Rica

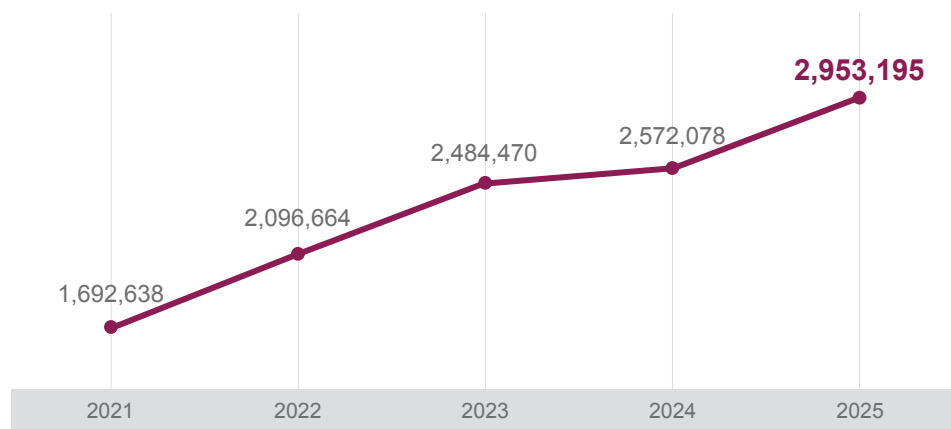
It should be noted that devices designed for other markets do not necessarily share the same technical specifications as those intended for our country. Factors such as frequency bands may vary by region, and in other countries, selective carrier blocking is permitted; therefore, it is not possible to guarantee that an unapproved device will operate properly on national mobile networks. This “seal of approval” guarantees that a device will work correctly with any carrier in Costa Rica and protects both the integrity of the networks and user safety.

The following are the key statistics for the associated processes.

Annual registry of devices approved for sale in Costa Rica

Type approval is increasingly recognized by consumers as a tool that guarantees the proper functioning of devices on the national mobile networks. The number of mobile devices certified for sale in the country grows annually. As a result, from 2021 to 2025, there was an increase of more than 1,260,000 registered mobile devices, representing a rise of over 80% in the number of type-approved devices for sale in the country.

GRAPH NO. 46
COSTA RICA: Number of type-approved devices

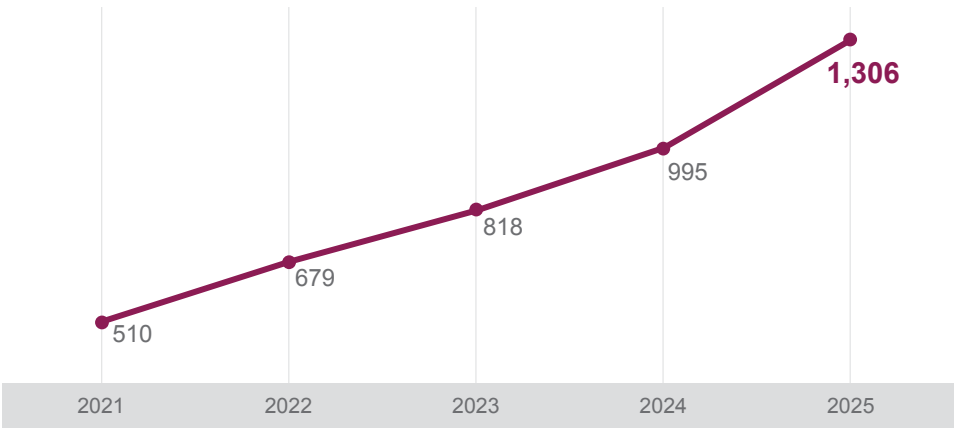


Source: SUTEL, General Directorate of Quality, Validation Platform, 2025.

Type Approval for Mobile Devices (mobile phones, tablets, and other devices operating on International Mobile Telecommunications ("IMT") networks)

As a result of constant technological evolution and the allocation of new frequency bands for mobile telecommunications, manufacturers are submitting more type approval processes. This makes more models available to the population in Costa Rica, catering to everyone's tastes, needs, interests, and economic means, which contributes to the digital inclusion of the population and the reduction of the digital divide. The year 2025 consolidated this growth trend, with a 31% increase compared to 2024, corresponding to more than 300 new certificates.

GRAPH NO. 47
COSTA RICA: Number of certificates issued for type-approved mobile devices (mobile phones)



Source: SUTEL, General Directorate of Quality, Validation Platform, 2025.

Certifications for Unlicensed Frequency Bands (Wi-Fi, Bluetooth, NFC, among others)

Between 2021 and 2024, the number of approval applications for devices using unlicensed frequency bands remained nearly constant, ranging from 561 to 643 certificates issued. However, in 2025, there was an increase (more than 120 new certificates, representing 18% growth) due to the introduction of more wearable devices and drones.

GRAPH NO. 48
COSTA RICA: Number of certificates issued for unlicensed bands (Wi-Fi, Bluetooth, NFC, etc.)



Source: SUTEL, General Directorate of Quality, Validation Platform, 2025.



Mobile Number Porting

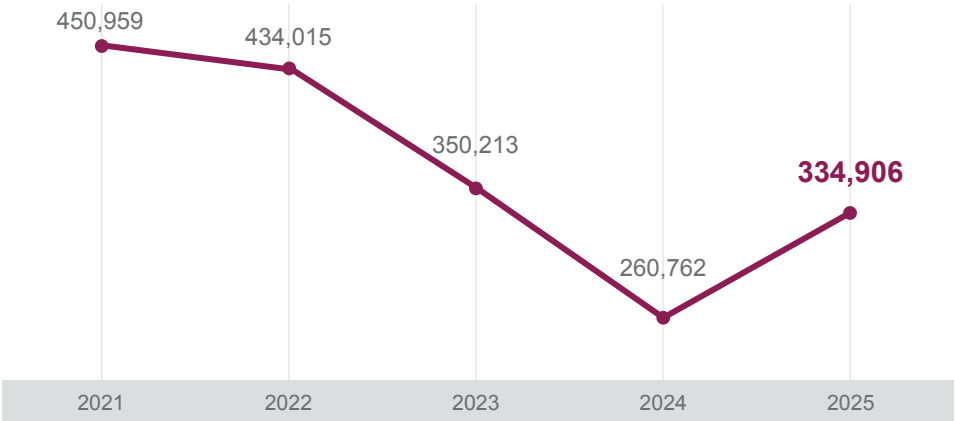
Mobile number porting in Costa Rica ensures that end users can exercise their right to keep their phone number, as established in Section 45, item 17, of the General Telecommunications Act (Law no. 8642), and has contributed to commercial dynamics in the mobile telephony sector. Market dynamics have led to significant changes, such as a reduction in the time required to switch carriers for prepaid services, a shorter period for number repatriation (return), and the allowance of number porting on holidays.

The key statistics are presented below.

Yearly Successful Portings, 2021–2025.

After a downward trend in the number of annual porting transactions during the 2021–2024 period, 2025 saw a 28.4% increase in carrier switches (more than 74 000 new porting transactions). New technologies (such as 5G) and promotional packages are driving the shift toward carriers that offer them.

GRAPH NO. 49
COSTA RICA: Yearly successful number ports, 2021–2025



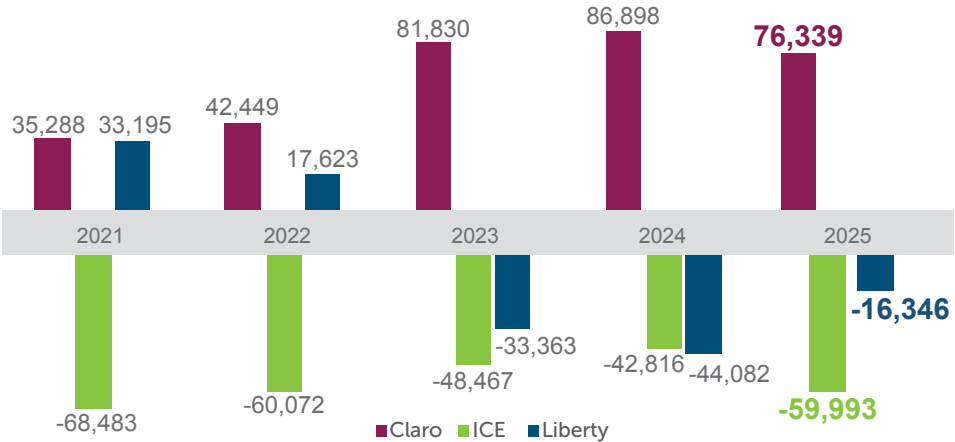
Source: SUTEL, General Directorate of Quality, Number Portability Reference Entity, 2025.

In 2025, **5G technology** became a driving **force behind mobile market** and carrier switches

Net portings by operator, 2021–2025.

The market dynamics of operator switching were influenced by the availability of 5G technology, which led to a decrease in customer losses for Liberty and an increase in outgoing customers for ICE (Kölbi). Claro remains the operator that adds the most new customers to its network.

GRAPH NO. 50
COSTA RICA: Net portings* by operator, 2021–2025



*Net portings: incoming portings minus outgoing portings.
Source: SUTEL, General Directorate of Quality, Number Portability Reference Entity, 2025.



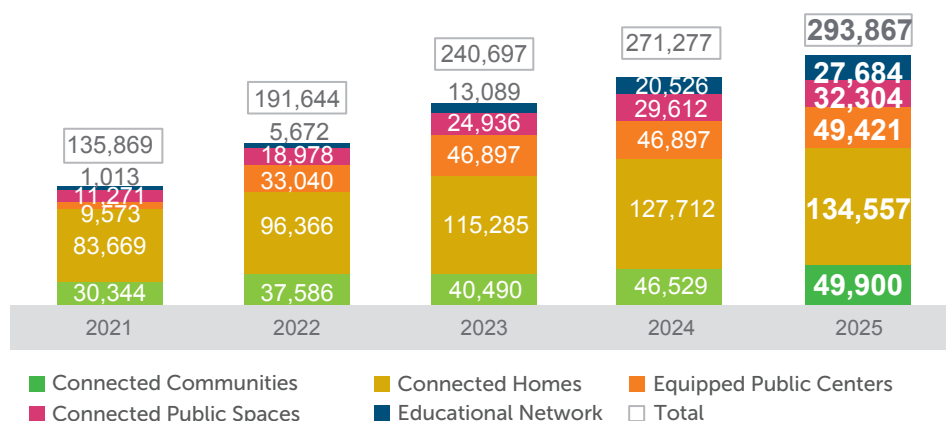
FONATEL

Fondo Nacional de Telecomunicaciones [National Telecommunications Fund, if translated].

In 2025, SUTEL marked 13 years of managing programs and projects aimed at bridging the digital divide, which are funded by the National Telecommunications Fund [“FONATEL”, per its acronym in Spanish], in accordance with the objectives set forth in the General Telecommunications Act [“LGT”, per its acronym in Spanish], No. 8642, and the goals established in the National Telecommunications Development Plan [“PNDT”, per its acronym in Spanish].

The projects implemented through FONATEL represent a cumulative investment of 293,867 million colones as of 2025, equivalent to 508 million dollars, of which 65% has been implemented over the last five years (see Graph no. 51). This investment represents 1.4% of the cumulative GDP for those years in the telecommunications and information services sector and 12% of the total investment made in the telecommunications market during that period.

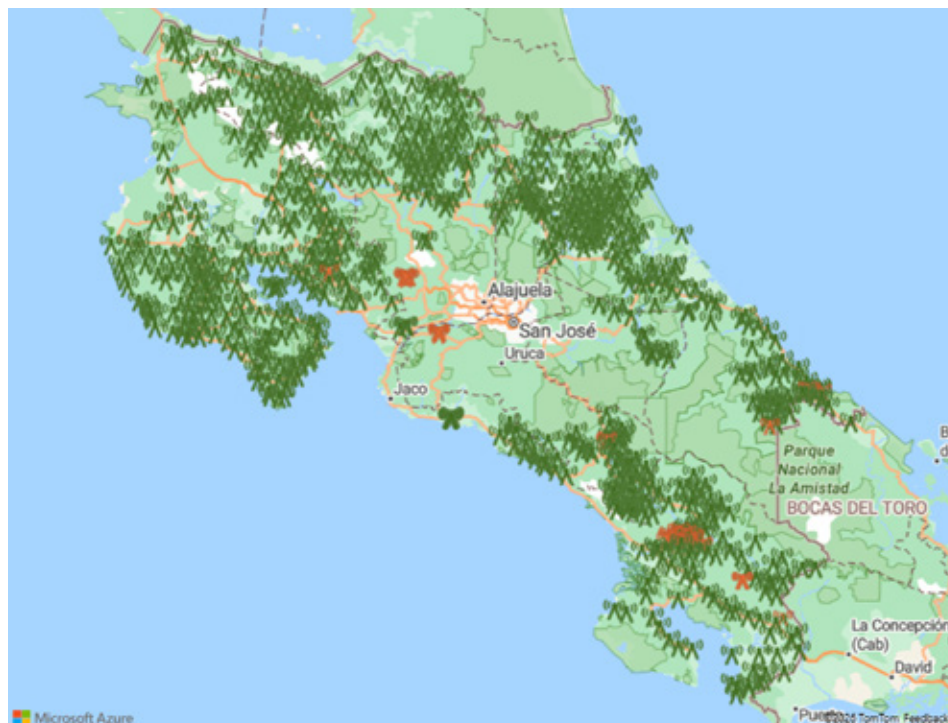
GRAPH NO. 51
COSTA RICA: Cumulative investment disbursed through FONATEL by program, 2021–2025
(yearly figures in millions of colones)



Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.

The investment made by FONATEL has enabled the deployment of 706 telecommunications towers and 20 fiber-optic nodes (see Map no. 01), thereby bringing connectivity to 130 (26%) districts and 17 (71%) indigenous territories in the country (see Map no. 02), in addition to establishing 513 free Internet access zones [“ZAIG”, per its acronym in Spanish], of which 165 continue to receive active subsidies (see Map no. 03).

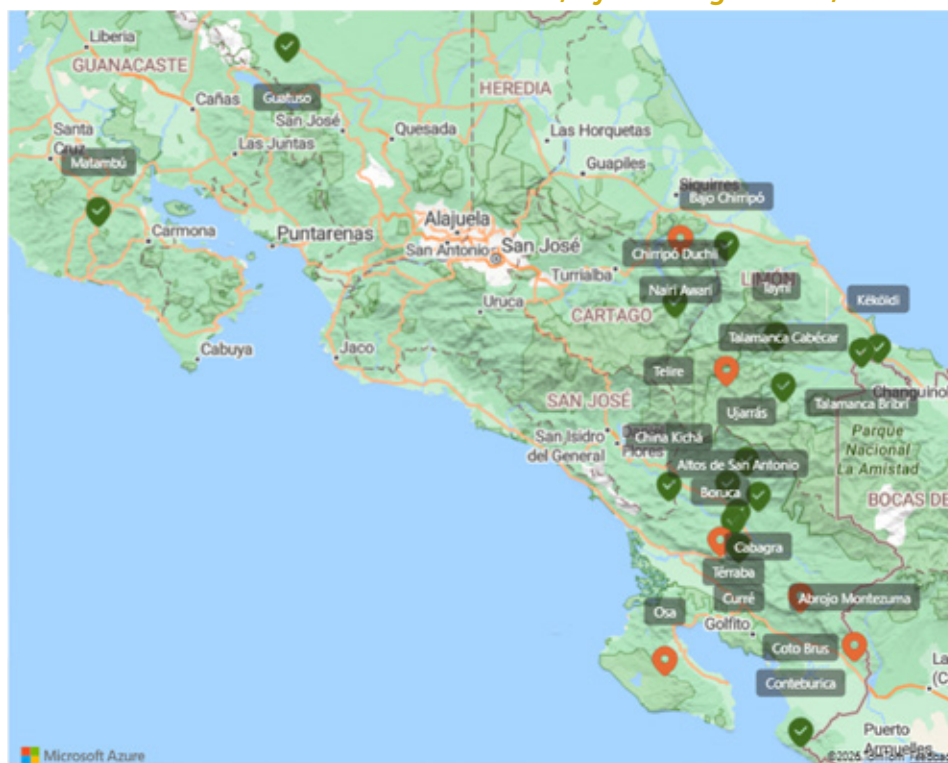
MAP NO. 01
COSTA RICA: Locations with telecommunications infrastructure installed, by operational status, 2025



Installation status: ■ 1- Pending ■ 3- In operation

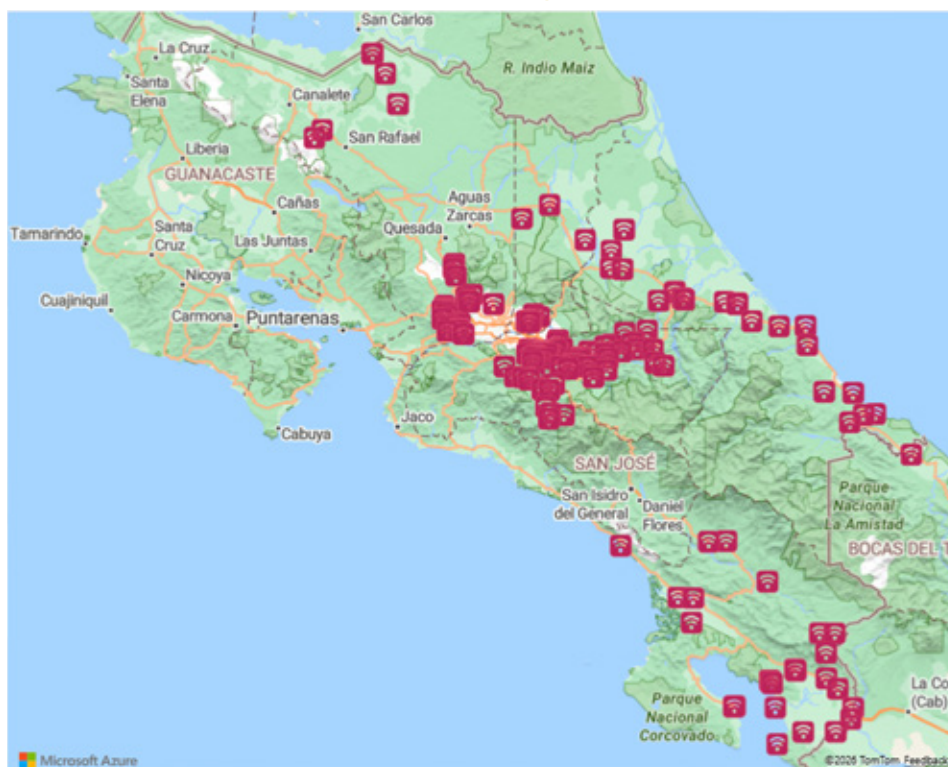
Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.

A total of **546,247 households** have benefited from projects implemented by FONATEL

MAP NO. 02**COSTA RICA: Indigenous territories with (full or partial) connectivity and access to voice and data services, by coverage status, 2025**

Status: ■ With services ■ Pending

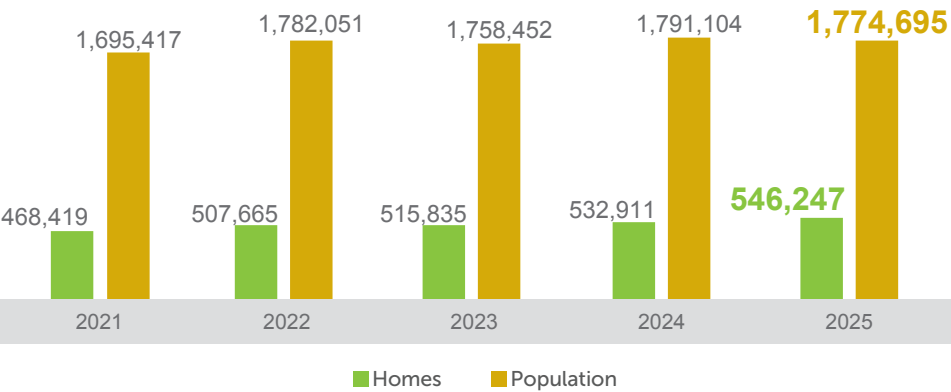
Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.

MAP NO. 03**COSTA RICA: Digital zones with free, government-subsidized Internet access, 2025**

Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.

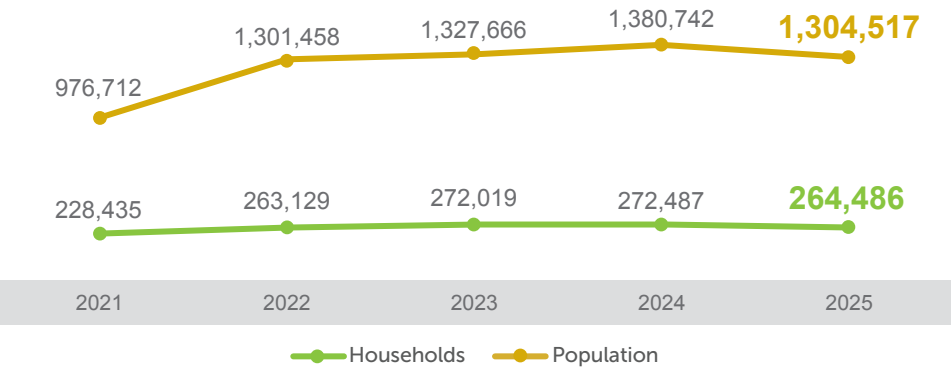
Thanks to the implementation of these projects, 546,247 households and 1,774,695 people have gained access to telecommunications services (see Graph no. 52), of which 264,486 households and 1,304,517 people have directly benefited from subscribing to these services (see Graph no. 53), totaling 155,998 mobile service connections and 264,082 fixed Internet service subscriptions (see Graph no. 54), which has had a direct impact on reducing the digital divide in the country. This represents a 20% contribution to fixed-line Internet market penetration and a 2% contribution to mobile telephony. In addition, a total of 1,967,975 students and minors have benefited, either through home Internet subscriptions at market rates or through subsidized plans, free Internet access in the ZAIGs, or in educational centers with fully subsidized connectivity (see Graph no. 55).

GRAPH NO. 52
COSTA RICA: Individuals and households with access to voice and data services in districts where programs funded by FONATEL are implemented, 2021–2025



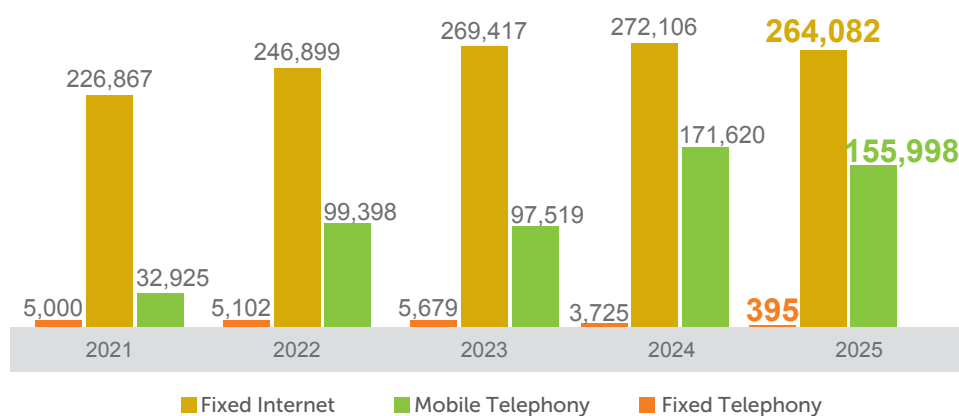
Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.

GRAPH NO. 53
COSTA RICA: Population and households benefiting from programs developed by FONATEL, 2021–2025



Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.

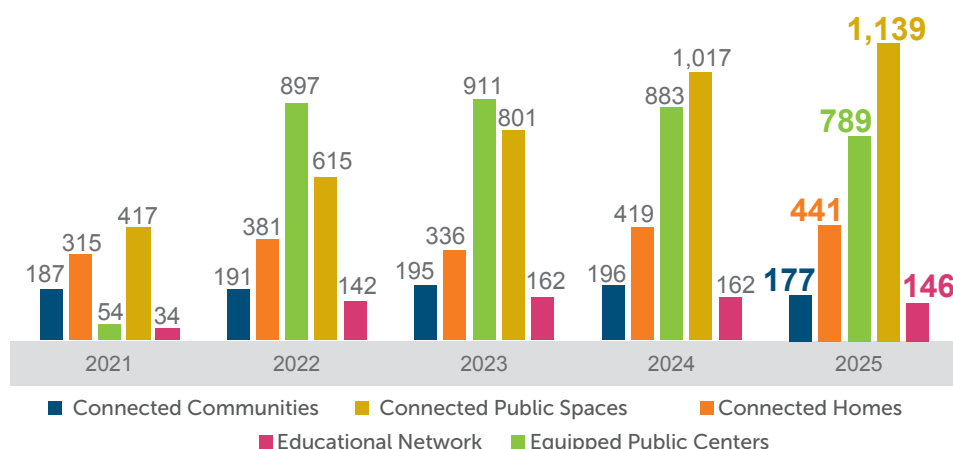
GRAPH NO. 54
COSTA RICA: Subscriptions to fixed and mobile telephony and Internet access provided through programs developed with FONATEL funds, 2021–2025



Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.



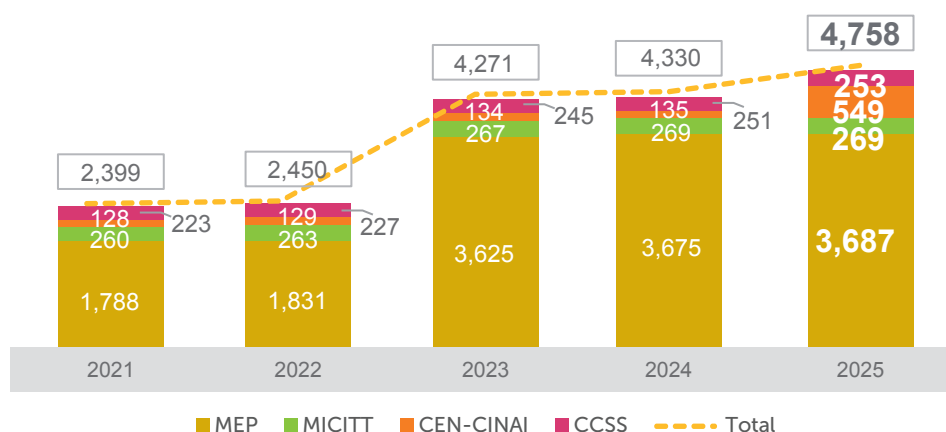
GRAPH NO. 55
COSTA RICA: Students and minors benefiting from programs
developed with FONATEL funds, by program, 2021–2025
 (yearly figures in thousands)



Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.

In addition, projects implemented through FONATEL have benefited 4,758 locations of state institutions that serve vulnerable populations by providing free connectivity for a fixed term and by distributing equipment for accessing and using ICTs (see Graph No. 56). In total, 316,247 devices have been distributed to both households living in poverty and Centers for the Provision of Public Services [“CPSP”, per its acronym in Spanish] operated by the MEP, MICITT, the Ministry of Health, and the CCSS (see Graph no. 57).

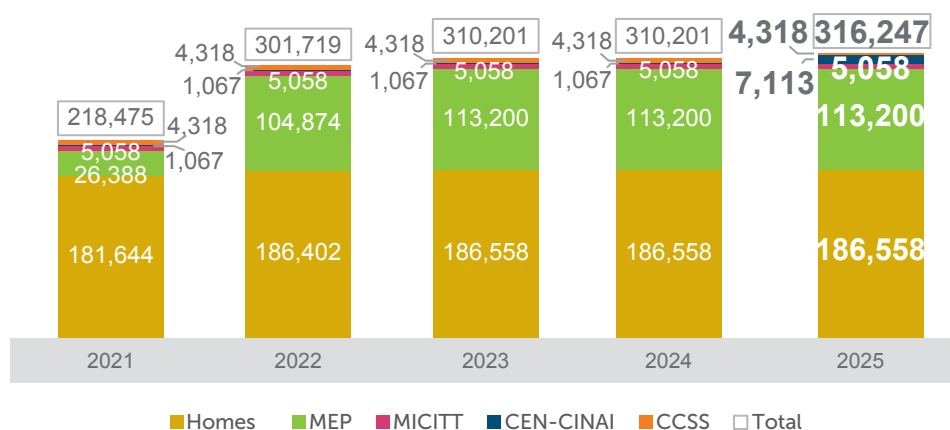
GRAPH NO. 56
COSTA RICA: Number of Centers for the Provision of Public Services
that have received benefits through FONATEL programs (equipment
and/or Internet) by institution, 2021-2025
 (yearly aggregate figures)



Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.



GRAPH NO. 57
COSTA RICA: Number of devices granted through programs developed with FONATEL resources to provide access to ICTs by beneficiary, 2021-2025
 (yearly aggregate figures)



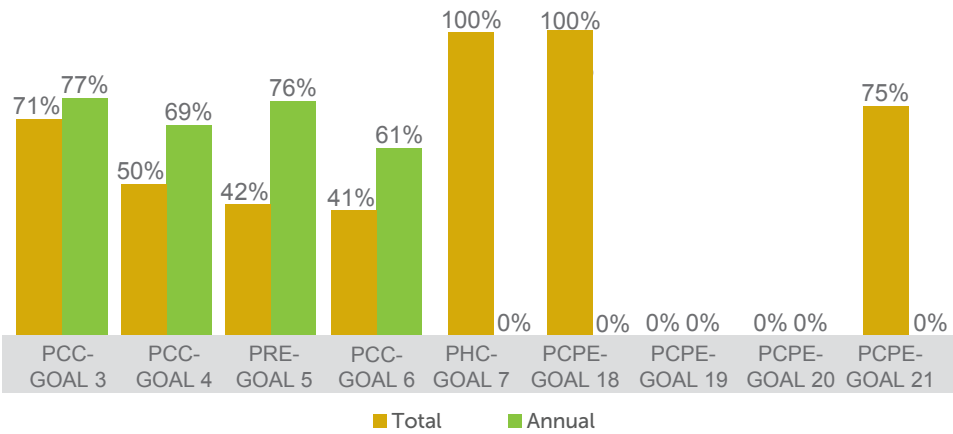
Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.

As of the end of 2025, five goals established in the PNDD 2022–2027 have been partially met, with annual progress exceeding 60% and total progress at 40%. Moreover, full achievement of goal no. 18 was attained, which joins the achievement of goal no. 7 (see Graph no. 58). It is important to note that work continues toward achieving the PNDD's goals ¹; to this end, 35 projects grouped into 5 programs remain in progress, in addition to 5 completed projects and 16 more that are in the formulation and/or bidding stage.

In 2025, the investment executed totaled USD 43 million. In the segment of students and minors, there was a 1% increase compared to 2024; CPSPs also saw a 10% increase, and the number of devices delivered grew by 2% over the past year.

¹ Goals numbers 3, 4, 5, 6, 19, 20, and 21 of the 2022–2027 National Development Plan (PNDD).

GRAPH NO. 58
COSTA RICA: Achievement of goals established in the 2022-2027
PNDT under FONATEL programs, 2025



Note: The goals established in the goal matrix of the 2022-2027 PNDT published in September 2025 ²
Source: SUTEL, General Directorate of FONATEL, Costa Rica, 2025.

2 *Connected Communities Program [“PCC”, per its acronym in Spanish] - goal 3: Connected Communities Program - goal: To provide 24 indigenous territories with fixed and mobile telecommunications’ services coverage by 2026.
*Connected Communities Program [“PCC”, per its acronym in Spanish] - goal 4: Connected Communities Program - goal: 262 districts will have coverage for fixed and mobile telecommunications services by 2027.
*Education Network Program [“PRE”, per its acronym in Spanish] - goal 5: Education Network Program - goal: 90% completion of the FONATEL Education Network by 2027.
*Connected Communities Program [“PCC”, per its acronym in Spanish] - goal 6: Connected Communities Program - goal: 331 CPSP locations connected through an Internet service subsidy by 2027.
*Connected Households Program [“PHC”, per its acronym in Spanish] - goal 7: Connected Households Program - goal: As of 2023, 100,684 vulnerable households with students receiving connectivity subsidies.
*Provisioned Public Centers Program [PCPE, per its acronym in Spanish] - goal 18: Provisioned Public Centers Program - goal: Provide 7113 Internet connectivity devices to CEN-CINAI by 2025.
*Provisioned Public Centers Program [PCPE, per its acronym in Spanish] - goal 19: Provisioned Public Centers Program - goal: Provide 7722 Internet connectivity devices to CONAPDIS by 2024.
*Provisioned Public Centers Program [PCPE, per its acronym in Spanish] - goal 20: Provisioned Public Centers Program - goal: Provide 476 Internet connectivity devices to CENAREC by 2024
*Provisioned Public Centers Program [PCPE, per its acronym in Spanish] - goal 21: Provisioned Public Centers Program - goal: Provide 5973 Internet connectivity devices to CECI by 2026.

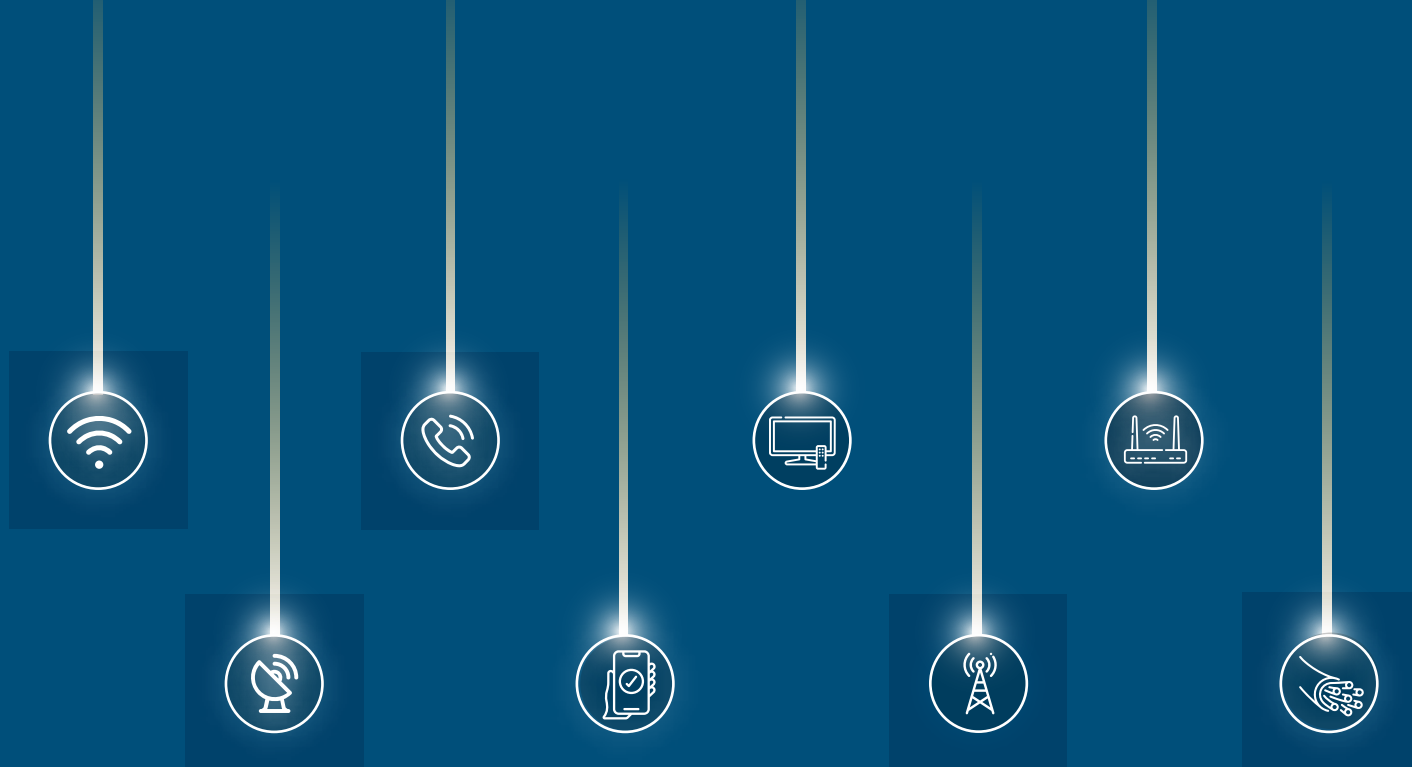




ACRONYMS

ARPU	The acronym for Average Revenue per User.
BCCR	The acronym of the “Banco Central de Costa Rica” [Central Bank of Costa Rica].
CCSS	The acronym of the “Caja Costarricense de Seguro Social” [Social Security Administration of Costa Rica].
CECIs	The acronym of the “Centros Comunitarios Inteligentes” [Intelligence Community Centers].
CENAREC	The acronym of the “Centro Nacional de Recursos para la Educación Inclusiva” [National Resource Center for Inclusive Education].
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]
CONAPDIS	The acronym of the “Consejo Nacional de Personas con Discapacidad” [National Council for People with Disabilities]
CPSPs	The acronym of the “Centros de Prestación de Servicios Públicos” [Centers for the Provision of Public Services].
DGF	The acronym of the “Dirección General de FONATEL” [General Directorate of FONATEL].
ENAH0	The acronym for “Encuesta Nacional de Hogares” [National Household Survey].
FONATEL	The acronym of the “Fondo Nacional de Telecomunicaciones” [National Telecommunications Fund].
GSMA	The acronym of the “Asociación GSM” [GSM Association].
HFC	The acronym for Hybrid Fiber-Coaxial. Hybrid fiber-coaxial networks that use DOCSIS, or other similar technologies, for the provision of services.
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].
IMT	The acronym of the International Mobile Telecommunications.
INEC	The acronym of the “Instituto Nacional de Estadística y Censos” [National Institute of Statistics and Censuses].

LGT	The acronym for the “Ley General de Telecomunicaciones” [General Telecommunications Act], Act No. 8642
Mbps	Megabits per second
MEP	The acronym of the “Ministerio de Educación Pública” [Ministry of Public Education].
MICITT	The acronym of the “Ministerio de Ciencia, Tecnología y Telecomunicaciones” [Ministry of Science, Technology and Telecommunications].
NFC	The acronym for Near Field Communication.
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.
PCC	The acronym for “Programa Comunidades Conectadas” [Connected Communities Program].
PCPE	The acronym for “Programa Centros Públicos Equipados” [Provisioned Public Centers Program].
PEPC	The acronym for “Programa Espacios Públicos Conectados” [Connected Public Spaces Program].
PHC	The acronym for “Programa Hogares Conectados” [Connected Households Program].
PNDT	The acronym for “Plan Nacional de Desarrollo de las Telecomunicaciones” [National Telecommunications Development Plan].
PRE	The acronym for “Programa Red Educativa” [Education Network Program]
PVC	The acronym for “Plataforma de Validación de Celulares” [Mobile Phone Validation Platform]
QoSE	The acronym for Quality of Service Experienced by the User.
SMS	The acronym for Short Message Service.
SUTEL	The acronym of the “Superintendencia de Telecomunicaciones” [Superintendency of Telecommunications]
TB	Terabyte
TIC	The acronym for “Tecnologías de la Información y la Comunicación” [Information and Communication Technologies]
UG	Management Unit in charge of executing FONATEL programs and projects.
VPN	The acronym for Virtual Private Network.
xDSL	The acronym for Digital Subscriber Line. A technology that uses a copper telephone platform for access.
ZAIG	The acronym of the “Zonas de Acceso a Internet gratuito” [Free Internet Access Zones]



Guachipelín, Escazú, Multipark Business Center, Tapantí Building, floor 4.

Toll-free number: 800-88SUTEL

Headquarters telephone number: 4000-000

gestiondocumental@sutel.go.cr