

Brazil Telecommunications Report Q2 2016

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Abstracts

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BMI View: The principal trend in 2016 will be one of consolidation involving mobile and wireline sectors. The biggest deal would be the sale or break-up of TIM Brasil, with leading players Vivo and Oi the likely winners. These companies would obtain significant market power through such a deal and close regulatory scrutiny should be expected; this may benefit some of the smallest players, particularly if assets such as spectrum and towers are sold off.

Latest Updates & Industry Developments

23mn mobile users were shed in 2015 as operators disconnected inactive SIM cards. More accurate data will enable operators to plan service and network upgrades more effectively and lower operating costs. 3G/4G migration will be a growth driver through to 2020, by which time there will be 246.6mn subscribers.

Wireline and cable TV operators reported subscriber losses in 2015, with mobile substitution the leading cause. Upgrades to fibre and defections to competitive carriers were also to blame, mitigating the overall decline.

Contents

BMI Industry View

SWOT

Industry Forecast

Latest Updates

Structural Trends

Table: Table: Telecoms Sector - Historical Data & Forecasts (Brazil 2014-2020)

Risk Reward Ratings

Latin America Telecoms Risk Reward Index

Table: Latin Americas Telecoms Risk/Rewards Index - Q216

Industry Risk Reward Ratings

Market Overview

Market Drivers & Trends

Mobile

Table: Brazil 3G Subscriptions By Technology ('000)

Table: Vendors Selected For 4G Roll-Outs

Wireline Voice & Broadband

Table: Fixed Lines In Service - Historical Concessionaires

Table: Fixed Lines In Service - Authorised Operators

Table: Wireline Broadband Subscriptions By Operator

Pay-TV/Convergence

Table: Pay-TV Subscriptions By Provider

Regulatory Development

Regulatory Overview

Table: Brazil's Regulatory Bodies And Their Responsibilities

Competitive Landscape

Table: Key Players - Telecoms

Table: Key Players - Media Sector

Mobile Operator Data

Table: Mobile Market Overview

Table: Vivo

Table: Claro

Table: TIM Brasil

Table: Oi

Table: Nextel do Brasil

Company Profile

Oi

Vivo (Telefônica)

TIM Brasil

Claro (America Móvil)

Demographic Forecast

Table: Population Headline Indicators (Brazil 1990-2025)

Table: Key Population Ratios (Brazil 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Brazil 1990-2025)

Table: Population By Age Group (Brazil 1990-2025)

Table: Population By Age Group % (Brazil 1990-2025)

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Risk/Reward Index Indicators

Table: Weighting Of Indicators

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