

# Venezuela Telecommunications Report Q2 2016

<https://marketpublishers.com/r/V7F344FE378EN.html>

Date: February 2016

Pages: 52

Price: US\$ 1,295.00 (Single User License)

ID: V7F344FE378EN

## Abstracts

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**BMI View:** The election of a more pro-business government offers hope that Venezuela's stagnant telecoms market can be reinvigorated through the application of external investment. However, the judiciary and civil service are largely manned by socialist sympathisers, and we expect efforts to privatise incumbent CANTV will be resisted. Additionally, economic reforms will be slow to be applied and slower still to bring any tangible benefits, meaning that disposable incomes will remain low.

### Latest Updates & Industry Developments

The mobile market shrank markedly in 2015 owing to the disconnection of inactive accounts and falling incomes. 3G/4G uptake proved more vibrant than expected due to state subsidies and enforced low tariffs. We forecast 29.4mn mobile subscriptions by 2020, of which 14.8mn will be 3G/4G.

The 'broadband' market has been shrinking as consumers discard dedicated mobile broadband access in favour of smartphone-delivered voice-and-data services. The ageing last-mile access network of CANTV cannot support wireline broadband expansion unless significant investment is obtained. We forecast 3.5mn broadband subscriptions by 2020, versus 3.4mn at the end of 2015.

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