

Pakistan Telecommunications Report Q3 2016

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Abstracts

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BMI View: We maintain a positive outlook for the Pakistani mobile market going forward into our current forecast period through to 2020. Mobilink's plan to acquire Warid received regulatory approval and the consolidation process is now underway. This will put significant pressure on competitors, especially CMPak (Zong), which has few strategic options other than to proceed with a USD1bn investment in its mobile-only business. The deal would not create an excessively-powerful player, but renewed price competition is expected and the negative impact on ARPUs can only be offset by increased uptake of premium services. This will be difficult in the prepaid-centric market, but the merger will at least motivate reviews of current business strategies.

Latest Updates And Industry Developments

3G/4G mobile users totalled 23.166mn at the end of 2015, representing 18.4% of the total mobile market. Although increased usage of non-voice services is reported, gains are neutralised by high taxes and termination rates as well as subsidised expansion into rural areas.

Pakistan will hold another spectrum auction in June 2016, this time auctioning off one block of 10MHz paired spectrum in the 850MHz band for an estimated USD395mn. This comes at a time when the national demand for wireless broadband and mobile data is growing rapidly.

The regulatory approval for the Mobilink-Warid deal will solidify the market leader's pole position and exert pressure on other operators, while perhaps leading to stiffer price competition.

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