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Abstracts

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BMI View: Telenet's acquisition of BASE, and more positive regulation in terms of wholesale fixed access should create the conditions of a more vibrant converged market. Incumbent Belgacom has so far had a first-mover advantage in that segment, and the arrival of more competition can only be positive for consumers, in what is a core driver for markets across Western Europe. Some short-term volatility could be seen from the two events, specifically the acquisition, but BMI believes they will the Belgian market stronger to develop more innovative services in the longer-term. Positive regulation for fixed access would be a better move for competition than the attempt to introduce a fourth player in the mobile market.

Key Data

The mobile market continues to grow, going above 13mn in Q115. Some volatility is expected from the Telenet/BASE deal, as the cable player's mobile strategy will be very different than the current one followed by KPN's subsidiary.

Belgacom grew its fixed voice connections in Q115, highlighting the success of its convergence strategy.

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