

Israel Telecommunications Report 2016

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Abstracts

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BMI View: We are concerned about the sustainability of the Israeli mobile market business model as a multitude of operators are competing in the market with very different business models. The traditional three large operators: Pelephone, Cellcom and Partner are losing subscribers at an increasingly alarming pace. Furthermore, the financial health of these three companies is further dwindling at a rapid pace. The market is being aggressively forced to bare the price competitiveness pressures being exerted by Golan and MIRS, both low cost operators. Both of these operators have significantly altered the competitive dynamics of the market and we fear that organic growth may not be able to return. The three large companies may struggle to find organic growth as 3G / 4G uptake and data services, high drivers of growth, are not present in the market to a degree that will allow easy capitalisation.

Latest Updates & Industry Developments

Pelephone, Partner and Cellcom, the three largest operators are rapidly losing revenue and subscribers at an increasingly alarming rate to low cost providers such as MIRS and Golan. The low-cost providers have been able to aggressively undercut the market and capture large shares based on low costs and low value services.

France-based company Orange has decided to terminate its agreement with Partner in 2017 and will pay EUR90mn to Partner so that it can rebrand itself. Furthermore, lawmakers have fiercely denounced the sale of Golan to a local rival and are supporting a foreign company to take over the profitable carrier as they are concerned about the negative impacts of consolidation.

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