

Pakistan Telecommunications Report Q1 2016

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Abstracts

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BMI View: Warid's 4G LTE network is its most attractive asset and is the primary attraction for Mobilink as it prepares to take over Pakistan's smallest mobile network operator. Consolidation would put additional pressure on Telenor, but acquisitions are unlikely to feature in its competitive response.

The merger between VimpelCom-owned Mobilink and Abu Dhabi Group-owned Warid Telecom would shrink Pakistan's mobile market from five players to four and entrench Mobilink as the largest player. We believe the putative deal would not create an excessively powerful player and therefore expect there to be little regulatory or industry opposition on this front. Second-ranked Telenor Pakistan will see the distance between itself and the market leader widen appreciatively and we believe it may push the regulator to demand the new entity divest excess spectrum and infrastructure in order to ensure a level playing-field. In any subsequent jockeying for control of these assets, Telenor has the financial means to outbid potential rivals. Excess 3G/4G frequencies held by Mobilink-Warid would give Telenor the means to deepen its coverage of metropolitan markets and pursue higher-value customers.

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