

Pakistan Telecommunications Report Q2 2016

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Abstracts

BMI View: Consolidation in the mobile market - with Mobilink set to acquire Warid - puts pressure on the remaining players, particularly CMPak (Zong), which has few strategic options other than proceeding with its 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.

Underinvestment by PTCL in wireline infrastructure and the limited reach of alternative players curtails expansion of broadband services. The high cost of broadband and connected devices means that next-generation networks would, in any case, be under-utilised for many years.

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