

Pakistan Telecommunications Report Q4 2015

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Abstracts

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BMI View: Pakistan's mobile market is one of the larger yet relatively underdeveloped mobile markets in the Asia Pacific region. The rollout of 3G/4G services in 2014 has given the market a new impetus. Mobile data usage has increased appreciably in the last two years and grew at a faster pace in Q115. This has paved the way for the emergence of a more content-focused industry, although reliance on low-cost prepaid services continues to weigh on the operators and keeps ARPUs low. Meanwhile the wireline market is dominated by the incumbent, creating an imbalance of power. There are few opportunities for an infrastructure-focused new entrant, although there is a case to be made for the establishment of an advanced national broadband network.

Key Data

There were 12.072mn 3G/4G mobile subscriptions in Pakistan at the end of March 2015, representing 8.9% of the total mobile market. We forecast subscriber numbers to grow to 76.783mn by 2019, or 48.8% of the market as operators push 'affordable' SIMs and devices.

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