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Abstracts

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BMI View: The European Commission's refusal to allow 3 and O2 to merge in the UK puts an end to consolidation efforts in the local market and perhaps other regional European markets for the foreseeable future. We believe that consolidation efforts could come to a halt until at least 2019, when a new Commission is set to take charge. Nevertheless, the previous acquisition of EE by BT creates a clear market leader in the UK telecoms market, offering both fixed and mobile services. This will accelerate the development of convergence in the country, which has lagged behind its European counterparts.

Competition would be boosted by the creation of stronger alternative players, but the deal between 3 and O2 is hitting strong regulatory scrutiny. Furthermore, BT is also under pressure over the future of Openreach and whether it is the right mechanism to drive advanced broadband investments. Latest Updates & Industry Developments

The European regulator's barring of the proposed 3 and O2 merger will keep the number of major telecommunications operators at four in the economy. We believe that BT will be leading the market by means of heavy investments into new technologies and will look to regain its top spot in terms of market shares from O2 in the coming months.

BMI estimates the UK mobile market ended Q116 with 78.39mn subscribers, a y-o-y growth of just 0.9%.

There were 33.61mn fixed line connections in operation in Q315, with BT having a 38.4% market share.

There were 29.96mn broadband subscribers in Q315, of which 24.4mn were fixed. Out of those, BT had a 32.3% market share.

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