

United Kingdom Telecommunications Report Q4 2016

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Abstracts

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BMI View: As the European telecoms sector is closely modelled on the UK regime, we anticipate little impact on the domestic market for retail and wholesale voice, data, broadband and pay-TV services to arise from the country's potential withdrawal from the European Union. A post-'Brexit' competitive landscape would be little changed as the major players are already UK-focused while the regulator's long-term view of market development does not differ from the views of the European Commission. That said, the greatest impact is likely to come at the regulatory level, as future UK governments are expected to take a more nuanced approach to overseeing issues such as data sovereignty, net neutrality and consumer privacy. The downside is that lower targets could be set by the government with respect to 'digital inclusion' initiatives such as rural broadband coverage, possibly putting the UK even further behind its European peers. The loss of valuable European Commission financing for such projects would accentuate that risk.

Latest Updates & Industry Developments

The terms of the UK's future relationship with the European Single Market are yet to be decided; UK operators' involvement in the European Digital Single Market will likely continue, given the importance of the UK as a technology research hub, its very attractive datacentre industry and access to key global international submarine cable systems. At the local level, little will change as the UK and European regulators effectively operate to very similar industry development models.

We anticipate little in the way of a slowdown in voice and broadband usage as these services have, in the past, proven to be largely resilient to economic

downturns and recessions such as those that might occur in the lead-up to and wake of 'Brexit'.

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