

# Spain - Telecoms, Mobile and Broadband - Statistics and Analyses

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## Abstracts

This report provides a comprehensive overview of trends and developments in Spain's telecommunications market. The report analyses the fixed-line, mobile and broadband sectors. Subjects include:

Market and industry analyses, trends and developments;

Facts, figures and statistics;

Industry and regulatory issues;

Infrastructure developments;

Major Players, Revenues, Subscribers, ARPU, MoU;

Mobile Voice and Data Markets;

Broadband (FttP, DSL, cable, wireless);

Mobile subscribers and ARPU;

Broadband market forecasts;

Government policies affecting the telecoms industry;

Market liberalisation and industry issues;

Telecoms operators – privatisation, IPOs, acquisitions, new licences;

Mobile technologies (GSM; 3G, HSPA, LTE, 5G).

## **EXECUTIVE SUMMARY**

Spain expected to have universal FttP coverage by 2024

Spain's telecom market is one of the largest in Europe, supported by a population of more than 46 million. Mobile penetration is on a par with the European average and there remains room for further growth, particularly in the mobile broadband segment which has been supported by continuing investment in infrastructure among operators. With LTE widely available, the focus among operators has shifted to services based on 5G. Vodafone Spain was the first operator to launch a 5G network, in June 2019, while the other players are expected to wait until after the auction of spectrum in the 700MHz band in mid-2020.

The fixed-line broadband sector has also been backed by investment in fibre infrastructure, enabling providers to develop improved bundled services and to compete more effectively. The regulator has fostered competition by providing access to Telefónica's DSL and FttP networks, while network sharing agreements have meant that Orange Spain, Vodafone Spain and Movistar have become significant operators. By mid-2019 fibre accounted for 62% of all fixed broadband connections. Telefónica alone expects to provide complete FttP coverage by 2024.

This report introduces the key aspects of the Spanish telecom market, providing statistics on the fixed-network services sector, and profiles of the main players. The report also assesses the main regulatory issues, noting the status of interconnection, local loop unbundling, number portability and carrier preselection. In addition, the report covers the fixed and wireless broadband markets, together with developments in related technologies, as well as analyses on the mobile sector, including an assessment of regulatory issues, a profile of the major providers, and a review of mobile data services and technologies including LTE and 5G. The report also provides fixed-line, broadband, mobile, and mobile broadband subscriber forecasts to 2024.

Key developments:

EllaLink submarine cable connecting Spain with Brazil to be ready in 2020;

Process to auction 694MHz-790MHz spectrum gets underway;

Telefonica joins the 5G Technological Cities project;

Orange and Vodafone sign revised network sharing agreement to include 5G;

Orange Spain adds ZTE as a 5G vendor partner;

Vodafone Spain launches 5G services;

Vodafone Spain contracts Huawei to upgrade its HFC network with DOCSIS3.1, launches a 1Gb/s broadband service to four million premises;

Movistar aiming to provide 100% FttP coverage by 2024;

Fibre broadband accounting for 62% of all fixed-line broadband connections

Report update includes the regulator's market data updates to June 2019, telcos' operating and financial data to Q2 2019, recent market developments.

Companies mentioned in this report:

Orange Spain, Telefonica (Movistar), Jazztel, Ono, Vodafone Spain, Lebara, Lycamobile, Masmovil, YouMobile, Yoigo

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